

# Tourism Quarterly

**Issue 17: January-March 2020**



**June 2020**

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# Introduction

Despite the current concern and uncertainty regarding next season, this edition of *Tourism Quarterly* provides a comprehensive overview of how last season performed, and how 2019 compared to previous years.

Although the season ended prematurely in March, a total of 1,648 leisure tourists visited the Islands during the period October-March, a 6.7% growth on the previous season. There were 1,939 leisure tourists visiting in 2019, up 1.6% on that recorded in 2018.

FIGAS carried a record 3,255 tourists in 2019, 27.3% more than were moved in 2018. Serviced Room Occupancy rates were up to 49.1%, almost 4 percentage points higher than in 2019, and the cruise season beat all previous records with 72,836 passenger arrivals, up 16.5% on the previous season.

This edition of *Tourism Quarterly* includes all the data from Q1 2020, as well as summaries for the season and for 2019. It also includes the findings from our annual air and cruise visitor surveys, which show overnight leisure visitors spent £4.8 million, up 12% on 2018, and cruise visitors spent £4.4 million, up 7.8% on the previous season. Overall international inbound visitors for all purposes spent over £15 million during the last year, a significant earner for the local economy.

Finally, whilst the future is particularly uncertain at this time, we've updated our forecasts for land-based and cruise visitor tourism to 2025, which are included at the back of the report. By the end of June we will publish *our 2019 Annual Tourism Statistics Report* which will provide detailed analysis of the season and 2019.

As always, please drop me a line with any comments or thoughts you have about *Tourism Quarterly*. The aim of the publication is to provide useful and easily accessible information for everyone involved in tourism.

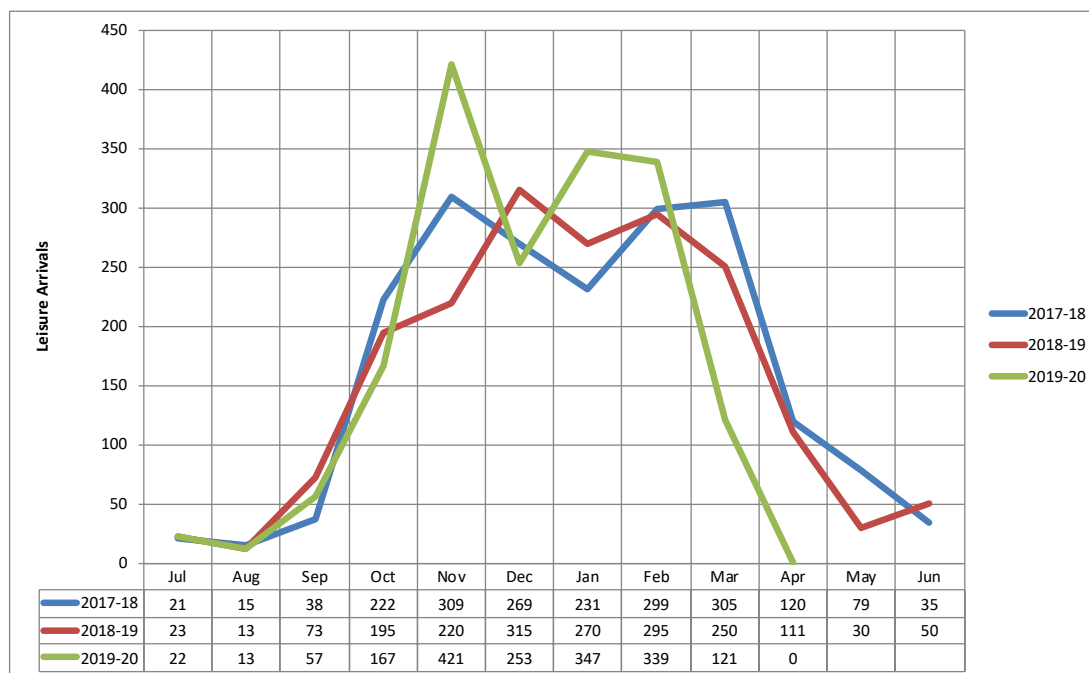


**Stephanie Middleton**  
Executive Director

# This Quarter

## Leisure Tourist Arrivals

Leisure tourist arrivals were marginally down 1.0% in Q1 2020 compared to the same period in 2019. January and February performed strongly, however the early end to the season due to the COVID-19 pandemic caused a sharp drop off in March.

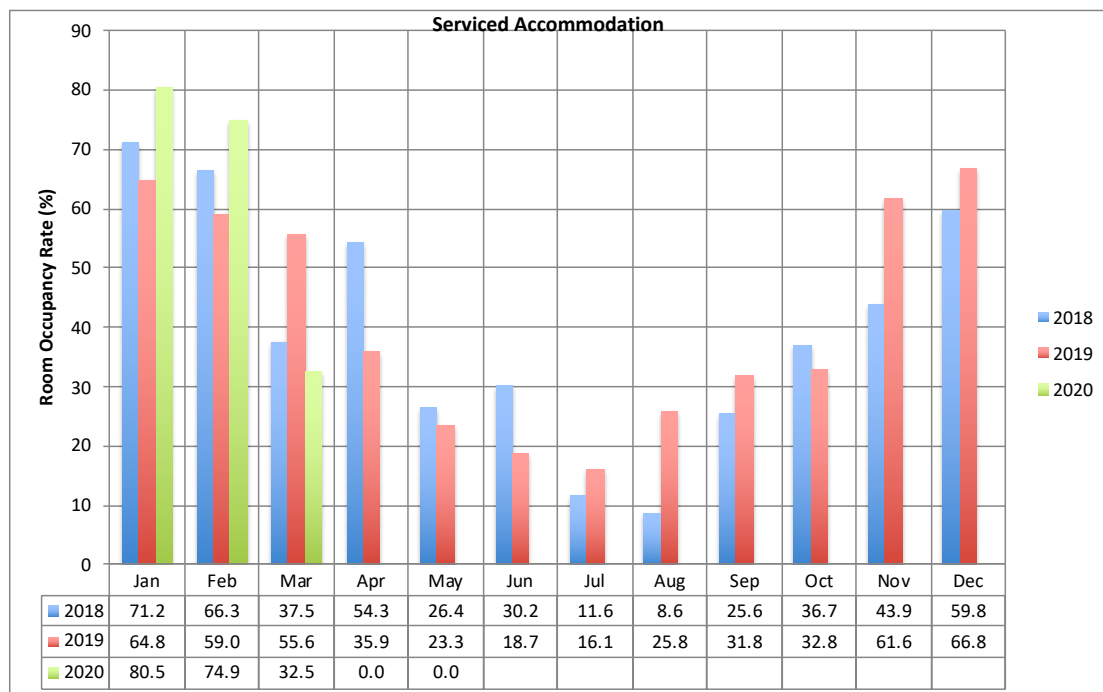


| Month | 2017-18 | 2018-19 | 2019-20 | Change (%) |
|-------|---------|---------|---------|------------|
| Jul   | 21      | 23      | 22      | (4.3)      |
| Aug   | 15      | 13      | 13      | 0.0        |
| Sep   | 38      | 73      | 57      | (21.9)     |
| Oct   | 222     | 195     | 167     | (14.4)     |
| Nov   | 309     | 220     | 421     | 91.4       |
| Dec   | 269     | 315     | 253     | (19.7)     |
| Jan   | 231     | 270     | 347     | 28.5       |
| Feb   | 299     | 295     | 339     | 14.9       |
| Mar   | 305     | 250     | 121     | (51.6)     |
| Apr   | 120     | 111     |         |            |
| May   | 79      | 30      |         |            |
| Jun   | 35      | 50      |         |            |

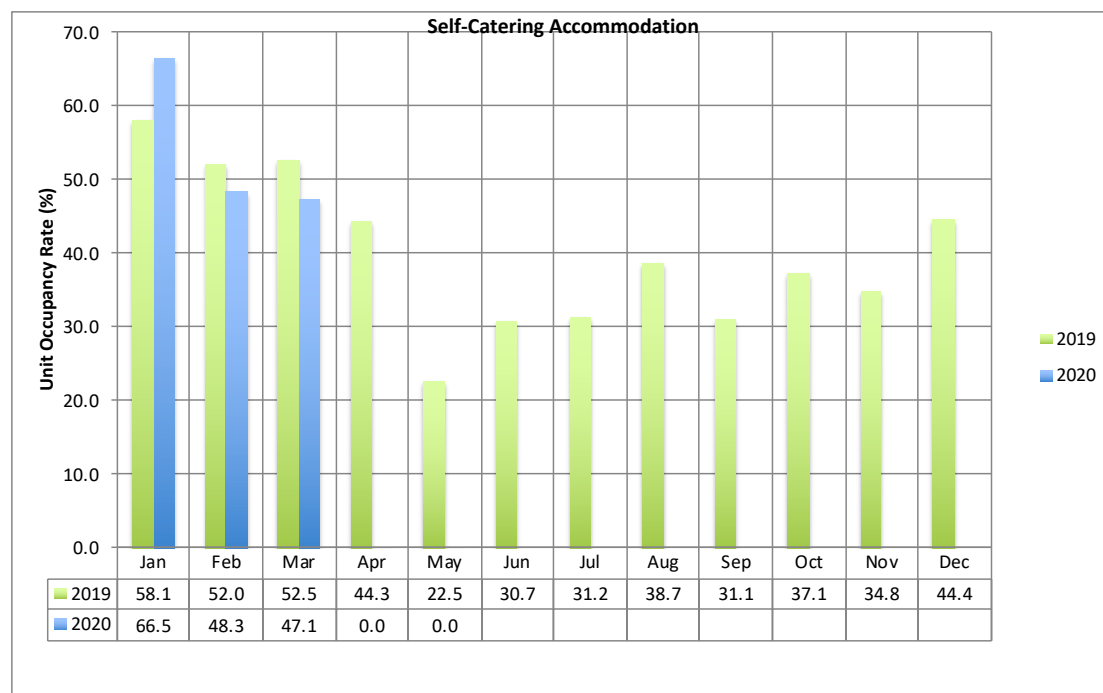
# This Quarter

## Accommodation Occupancy

Very much reflecting the pattern in tourist arrivals, serviced accommodation room rates were up significantly in January and February, reaching a record high of 80.5% in January. However, due to the drop in arrivals in March, occupancy was affected, achieving only 32.5%, less than in the previous two years.



Self-catering accommodation was also strong in January, achieving 66.5%. However, rates in February and March were slightly lower than those achieved in 2019.

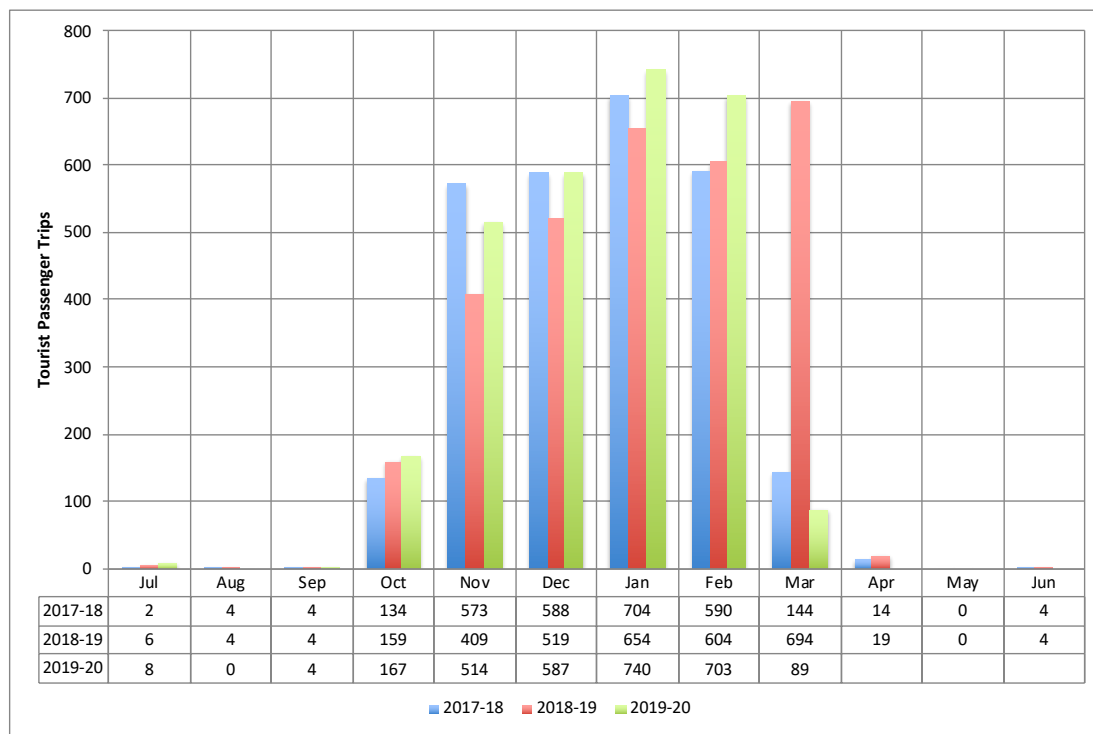




# This Quarter

## Tourist Passengers Carried on FIGAS

A record 740 leisure passenger trips were flown by tourists in January, and February was also very busy (703). However due to the shortening of the 2019-2020 season, this dropped to just 89 in March.



| Month | 2017-18 | 2018-19 | 2019-20 | % Growth |
|-------|---------|---------|---------|----------|
| Jul   | 2       | 6       | 8       | 33.3     |
| Aug   | 4       | 4       | 0       | -        |
| Sep   | 4       | 4       | 4       | 0.0      |
| Oct   | 134     | 159     | 167     | 5.0      |
| Nov   | 573     | 409     | 514     | 25.7     |
| Dec   | 588     | 519     | 587     | 13.1     |
| Jan   | 704     | 654     | 740     | 13.1     |
| Feb   | 590     | 604     | 703     | 16.4     |
| Mar   | 144     | 694     | 89      | (87.2)   |
| Apr   | 14      | 19      |         |          |
| May   | 0       | 0       |         |          |
| Jun   | 4       | 4       |         |          |

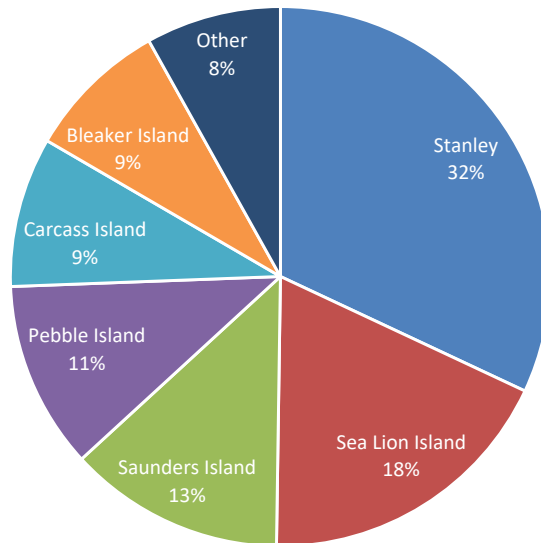
Courtesy of FIGAS

# This Quarter

## Tourist Passengers Carried on FIGAS by Destination

Analysis by place of arrival shows that almost one-third (32%) of all tourist arrivals were to Stanley, with the busiest destination in camp being Sea Lion Island (18% of all arrivals), followed by Saunders Island (13%) and Pebble Island (11%).

| Destination     | %     |
|-----------------|-------|
| Stanley         | 32.0  |
| Sea Lion Island | 18.3  |
| Saunders Island | 12.9  |
| Pebble Island   | 11.2  |
| Carcass Island  | 9.0   |
| Bleaker Island  | 8.5   |
| Port Howard     | 3.2   |
| Darwin          | 2.0   |
| Weddell Island  | 1.3   |
| Mount Pleasant  | 0.9   |
| Fox Bay         | 0.4   |
| Other           | 0.4   |
| All Arrivals    | 100.0 |



Courtesy of FIGAS

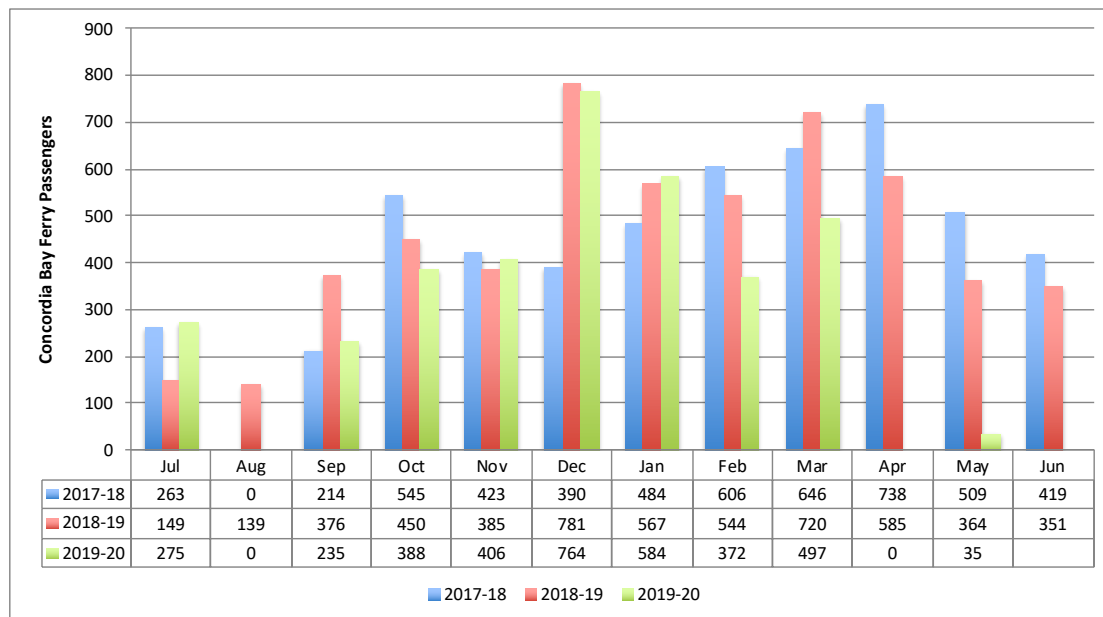




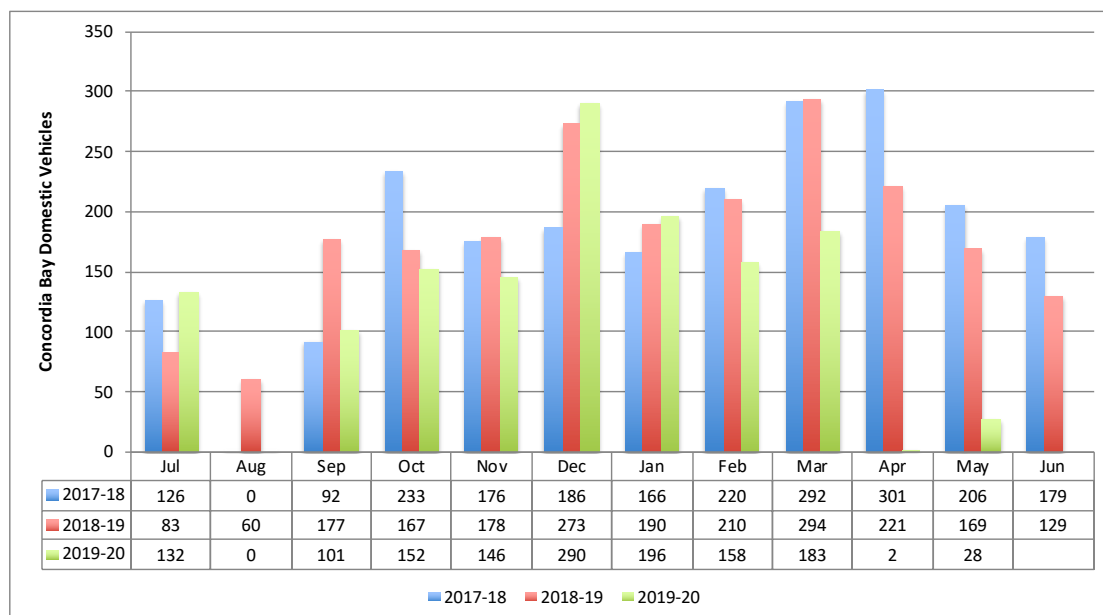
# This Quarter

## Passengers and Domestic Vehicles on Concordia Bay Ferry

Passengers carried between East and West Falkland on the Concordia Bay Ferry fell by 20.6% in Q1 2020 compared to the same period in 2019. Whilst January was busier than in 2018 or 2019, there were considerably fewer passengers travelling in February and March.



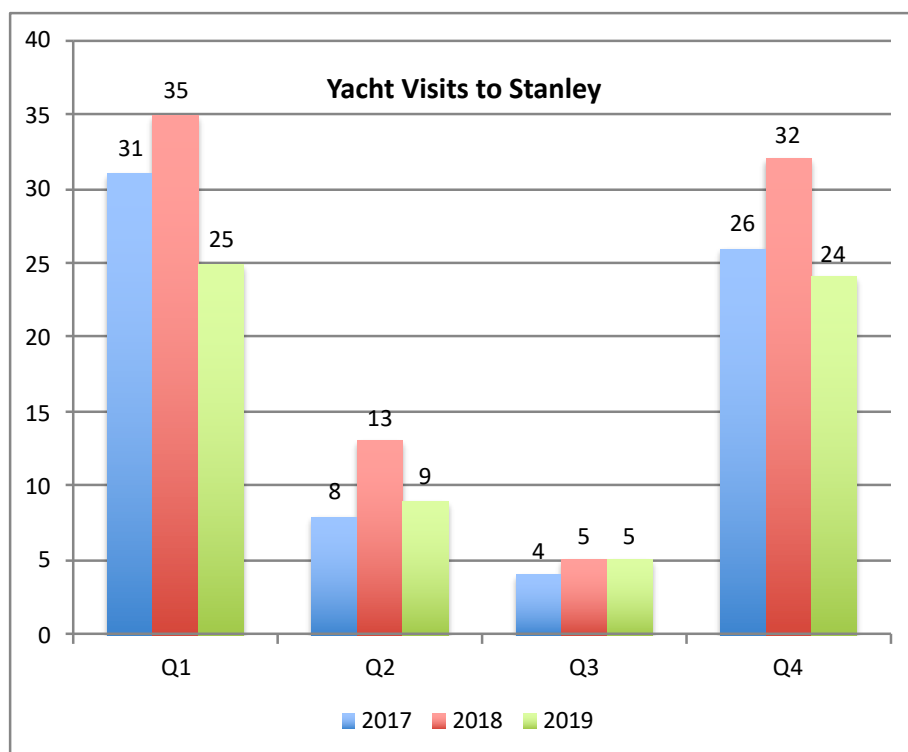
Similarly, vehicles carried were also down, by 22.6% in Q1 2020 compared to the same period in 2019.



# This Quarter

## Yacht Visits to Stanley

There has been no update regarding yacht arrivals in Stanley during Q1 2020 to report in this edition of Tourism Quarterly



Courtesy of Falkland Islands Yacht Club

## Jetty Visitor Centre Footfall

The JVC footfall was up by 3.4% in Q1 2020 compared to the same period in 2019. A total of 54,066 people visited the JVC in Q1, and almost 82,000 over the whole Oct 2019-Mar 2020 season, which represents a 10.1% increase over the previous season.

| Month        | 2017-18       | 2018-19       | 2019-20 | % Growth |
|--------------|---------------|---------------|---------|----------|
| Jul          | 314           | 0             | 327     | -        |
| Aug          | 316           | 284           | 399     | 40.5     |
| Sep          | 616           | 480           | 620     | 29.2     |
| Oct          | 4,437         | 3,604         | 1,103   | (69.4)   |
| Nov          | 7,689         | 6,616         | 9,644   | 45.8     |
| Dec          | 10,202        | 11,841        | 17,054  | 44.0     |
| Jan          | 21,265        | 17,877        | 18,881  | 5.6      |
| Feb          | 19,249        | 22,749        | 23,804  | 4.6      |
| Mar          | 7,755         | 11,646        | 11,381  | (2.3)    |
| Apr          | 507           | 1,505         |         |          |
| May          | 543           | 421           |         |          |
| Jun          | 282           | 314           |         |          |
| <b>Total</b> | <b>73,175</b> | <b>77,337</b> |         |          |

# This Quarter

Website: [www.falklandislands.com](http://www.falklandislands.com)

The number of unique visitors to the website continues to exhibit strong growth. There were almost 55,000 unique visitors in March, and then stronger growth in April. The number of pages viewed passed the 100,000 market between March and April for the first time.

| Website | Unique Visitors |        |       | Pages Viewed |         |      |
|---------|-----------------|--------|-------|--------------|---------|------|
|         | 2019            | 2020   | (%)   | 2019         | 2020    | (%)  |
| Jan     | 24,680          | 37,528 | 52.1  | 74,700       | 96,847  | 29.6 |
| Feb     | 22,909          | 32,534 | 42.0  | 54,147       | 79,004  | 45.9 |
| Mar     | 24,787          | 55,183 | 122.6 | 57,291       | 97,089  | 69.5 |
| Apr     | 27,207          | 62,980 | 131.5 | 60,538       | 111,644 | 84.4 |
| May     | 24,813          | 47,140 | 90.0  | 55,261       | 89,330  | 61.7 |
| Jun     | 22,171          |        |       | 48,188       |         |      |
| Jul     | 26,053          |        |       | 55,830       |         |      |
| Aug     | 25,351          |        |       | 58,708       |         |      |
| Sep     | 35,889          |        |       | 78,812       |         |      |
| Oct     | 36,852          |        |       | 81,799       |         |      |
| Nov     | 36,563          |        |       | 87,044       |         |      |
| Dec     | 37,383          |        |       | 86,953       |         |      |

## Social Media: Facebook and Twitter

Facebook reach was down on the same period in 2019, but has started to perform particularly well from March due to new algorithms being used. Twitter impressions were up in January but below the 2019 figures for the remainder of the quarter.

| Social Media | Facebook Reach |         |        | Twitter Impressions |        |        |
|--------------|----------------|---------|--------|---------------------|--------|--------|
|              | 2019           | 2020    | (%)    | 2019                | 2020   | (%)    |
| Jan          | 1,354,670      | 413,157 | (69.5) | 40,100              | 58,200 | 45.1   |
| Feb          | 2,610,402      | 367,639 | (85.9) | 76,500              | 43,300 | (43.4) |
| Mar          | 622,928        | 962,729 | 54.5   | 57,300              | 47,500 | (17.1) |
| Apr          | 631,993        | 820,452 | 29.8   | 49,300              | 42,600 | (13.6) |
| May          | 532,994        | 676,246 | 26.9   | 46,000              | 37,800 | (17.8) |
| Jun          | 443,445        |         |        | 30,200              |        | #NUM!  |
| Jul          | 801,624        |         |        | 55,600              |        | #NUM!  |
| Aug          | 654,400        |         |        | 64,700              |        | #NUM!  |
| Sep          | 603,570        |         |        | 39,500              |        | #NUM!  |
| Oct          | 396,304        |         |        | 53,500              |        | #NUM!  |
| Nov          | 364,800        |         |        | 58,200              |        | #NUM!  |
| Dec          | 419,434        |         |        | 57,500              |        | #NUM!  |

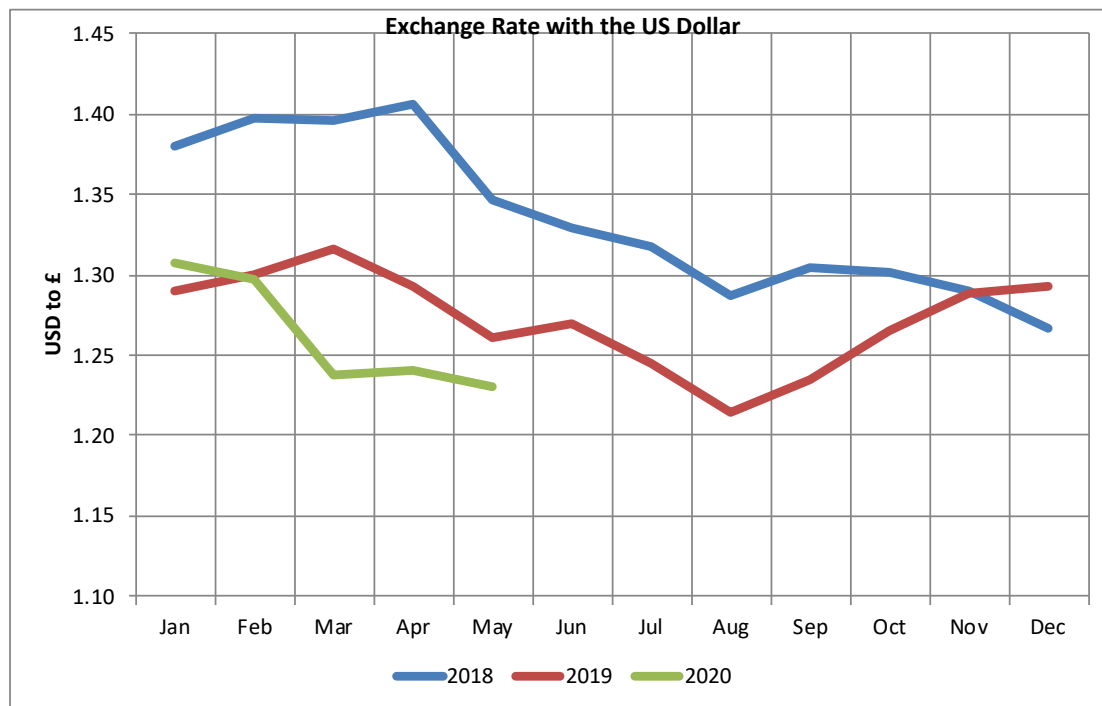
*Facebook Reach: Total number times a post is displayed (seen) in the month*

*Twitter Impressions: Total number of times a tweet is displayed (seen) in the month*

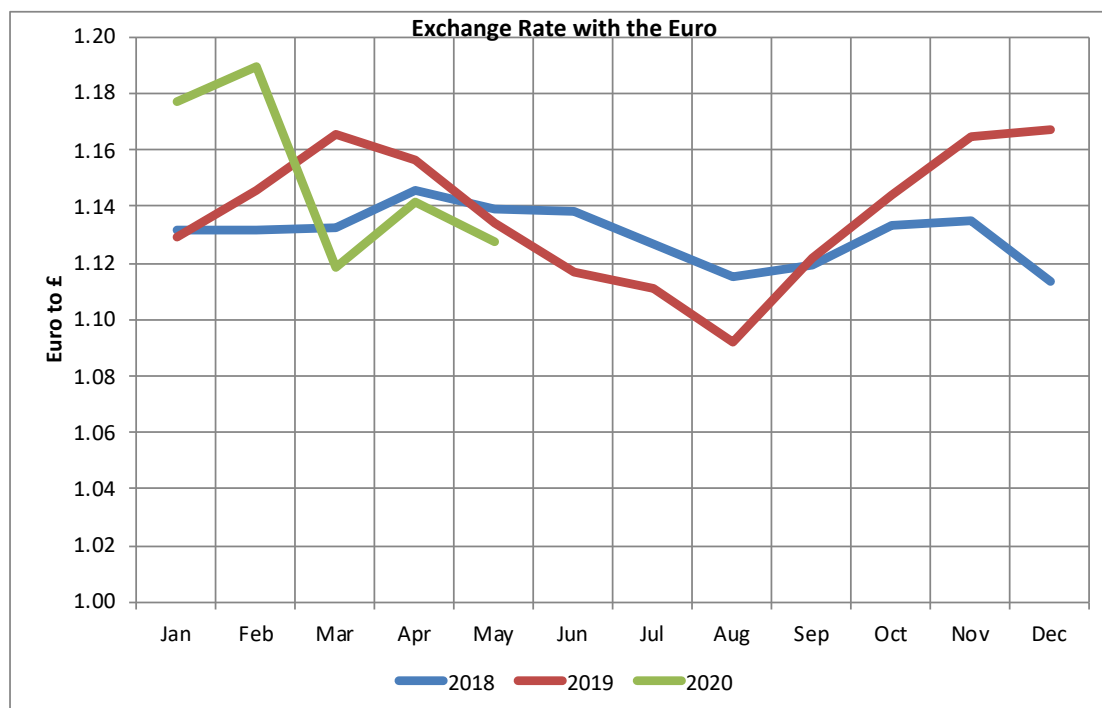
# This Quarter

## Currency Exchange Rates

**US Dollar:** During Q1 the pound weakened against the dollar, and by March it was almost back to its lowest point in 2019. This makes the Falklands cheaper for US visitors and is therefore good for inbound travel.



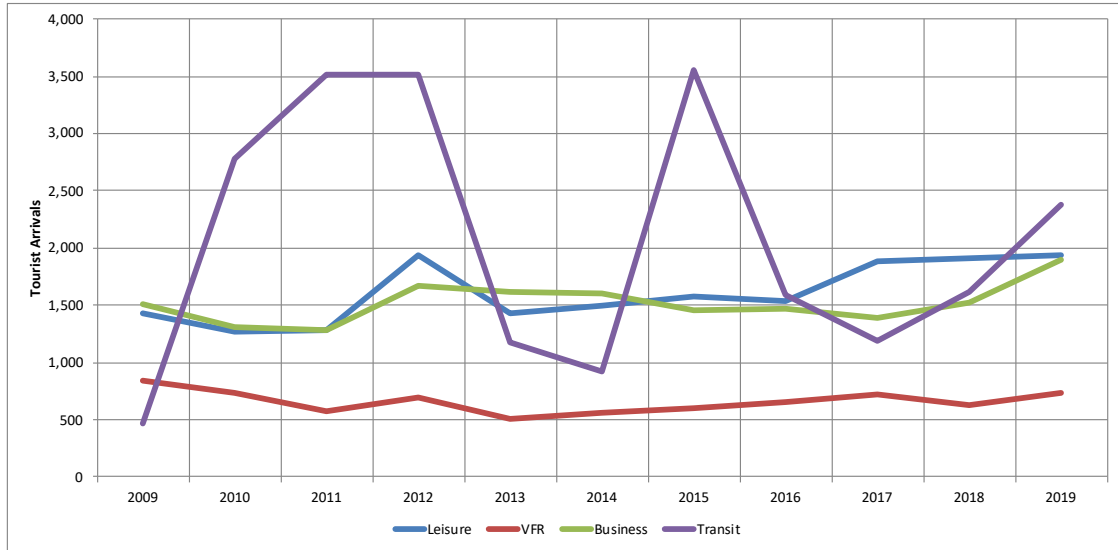
**Euro:** The value of the pound also weakened against the euro during Q1 largely due to the COVID-19 pandemic. This makes the Falklands cheaper for eurozone visitors and is therefore good for inbound travel.



# Long Term Trends

## Tourist Arrivals by Purpose of Visit (2009-2019)

Leisure tourism grew by 1.6% in 2019, which represents three straight years of growth from 1,540 in 2016 to 1,939 in 2019. Visits to friends and relatives (VFR) also grew, by 17.2%, business visitors grew by 24.6%, and transit visitors by 47.2%. Overall, tourist arrivals for all purposes grew by 22.5%.

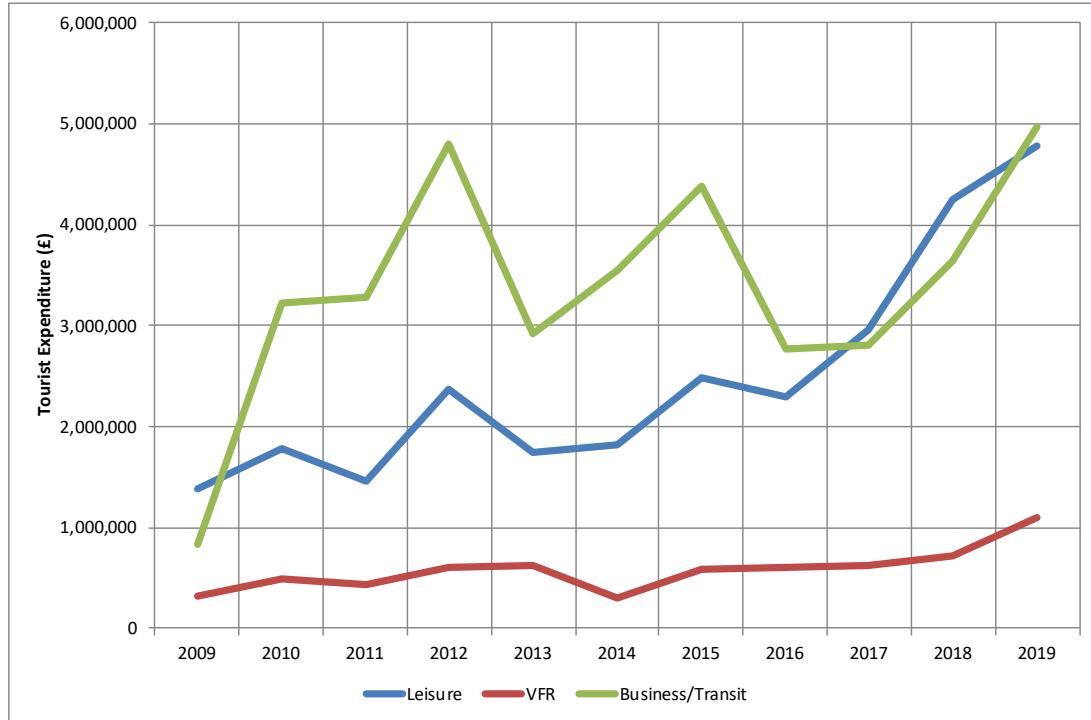


| Year | Leisure | VFR | Business | Transit | Total | Leisure Growth (%) | Total Growth (%) |
|------|---------|-----|----------|---------|-------|--------------------|------------------|
| 2009 | 1,429   | 839 | 1,510    | 468     | 4,246 | (16.9)             | (17.0)           |
| 2010 | 1,271   | 735 | 1,314    | 2,778   | 6,098 | (11.1)             | 43.6             |
| 2011 | 1,276   | 578 | 1,277    | 3,518   | 6,649 | 0.4                | 9.0              |
| 2012 | 1,940   | 693 | 1,672    | 3,507   | 7,812 | 52.0               | 17.5             |
| 2013 | 1,426   | 501 | 1,621    | 1,179   | 4,727 | (26.5)             | (39.5)           |
| 2014 | 1,494   | 559 | 1,599    | 922     | 4,574 | 4.8                | (3.2)            |
| 2015 | 1,576   | 605 | 1,455    | 3,553   | 7,189 | 5.5                | 57.2             |
| 2016 | 1,540   | 657 | 1,468    | 1,584   | 5,249 | (2.3)              | (27.0)           |
| 2017 | 1,884   | 718 | 1,392    | 1,184   | 5,178 | 22.3               | (1.4)            |
| 2018 | 1,908   | 628 | 1,522    | 1,615   | 5,673 | 1.3                | 9.6              |
| 2019 | 1,939   | 736 | 1,897    | 2,378   | 6,950 | 1.6                | 22.5             |

# Long Term Trends

## Tourist Expenditure by Purpose of Visit (2009-2019)

Tourist (all purposes) expenditure is calculated from the Air Visitor Survey undertaken by FITB at MPA. In 2019, leisure tourism generated almost £4.8 million in visitor expenditure (up 12.4%), with all types of tourist generating over £10.8 million (up 25.7%).



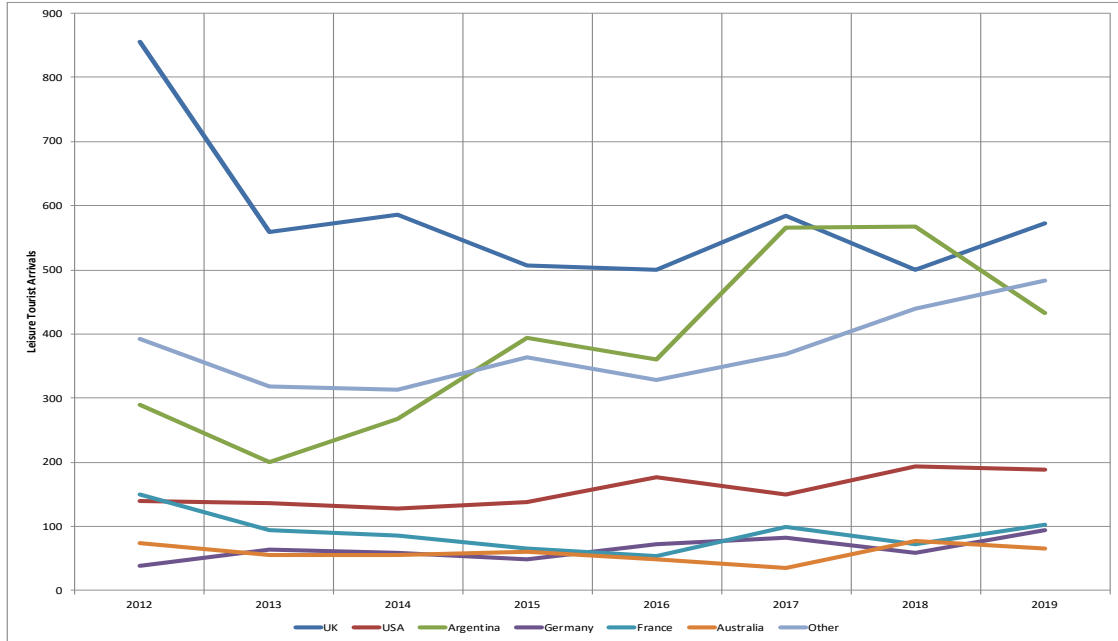
| Year | Leisure (£) | VFR (£)   | Business and Transit (£) | Total (£)  |
|------|-------------|-----------|--------------------------|------------|
| 2009 | 1,377,367   | 316,014   | 827,058                  | 2,520,439  |
| 2010 | 1,784,484   | 491,199   | 3,217,856                | 5,493,539  |
| 2011 | 1,466,762   | 433,566   | 3,277,600                | 5,177,928  |
| 2012 | 2,367,014   | 605,500   | 4,802,000                | 7,774,514  |
| 2013 | 1,738,650   | 615,209   | 2,918,767                | 5,272,625  |
| 2014 | 1,820,273   | 297,587   | 3,541,343                | 5,659,203  |
| 2015 | 2,485,046   | 587,700   | 4,375,710                | 7,448,457  |
| 2016 | 2,301,832   | 600,524   | 2,759,802                | 5,662,158  |
| 2017 | 2,952,562   | 622,746   | 2,798,967                | 6,374,276  |
| 2018 | 4,248,173   | 727,273   | 3,638,649                | 8,614,095  |
| 2019 | 4,776,858   | 1,094,563 | 4,958,630                | 10,830,052 |





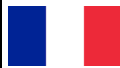




# Long Term Trends

## Leisure Tourist Arrivals by Country of Residence (2012-2019)

The UK, the Falklands' main market, bounced back to prominence in 2019 with a 14.4% growth. Visitors from Argentina fell by almost 24%, and there was a small decline in leisure tourists from the USA and Australia. Both Germany and France exhibited strong growth, and the "Other" countries increased their market share, now representing 25% of all arrivals.



| Year |  |  |  |  |  |  |  | Total |
|------|---|---|---|---|---|--|---|-------|
| 2012 | 856   | 140   | 289   | 38  | 150   | 74   | 393   | 1,940 |
| 2013 | 559   | 136   | 201   | 63  | 94  | 55   | 318   | 1,426 |
| 2014 | 586   | 128   | 268   | 58  | 85  | 56   | 313   | 1,494 |
| 2015 | 507   | 138   | 394   | 49  | 65  | 60   | 363   | 1,576 |
| 2016 | 500   | 177   | 361   | 73  | 53  | 48   | 328   | 1,540 |
| 2017 | 584   | 149   | 565   | 83  | 99  | 35   | 369   | 1,884 |
| 2018 | 500   | 193   | 568   | 58  | 72  | 77   | 440   | 1,908 |
| 2019 | 572   | 188   | 432   | 94  | 103   | 66   | 484   | 1,939 |

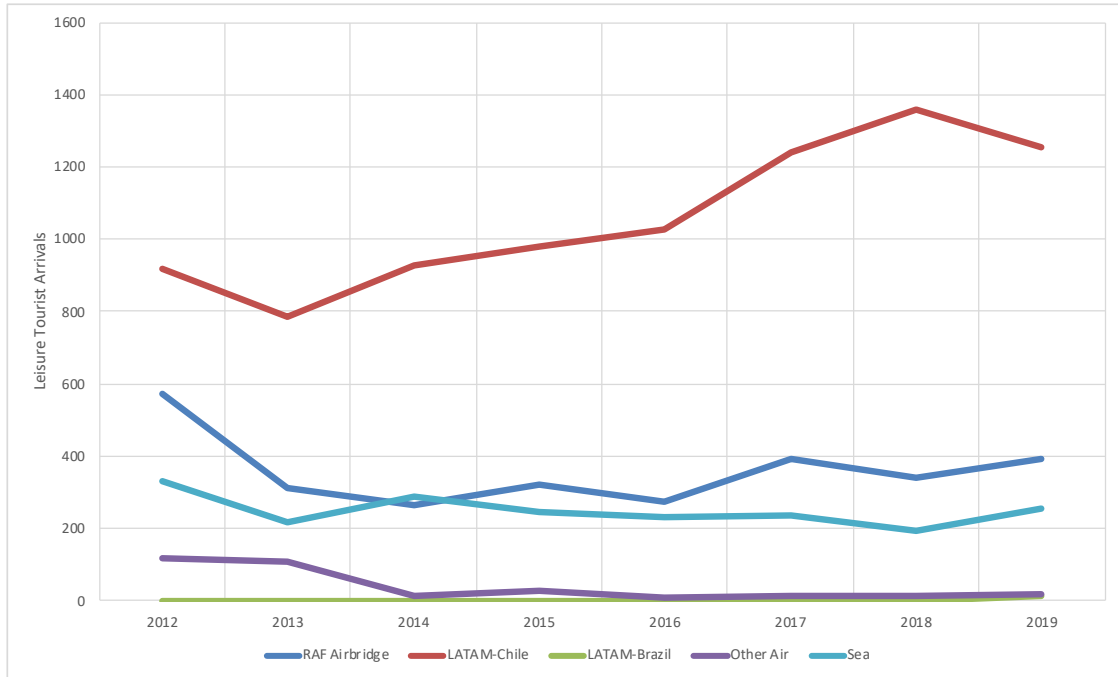
### Year-on-year Growth Rates

|      |        |        |        |        |        |        |        |        |
|------|--------|--------|--------|--------|--------|--------|--------|--------|
| 2012 | 60.9   | 37.3   | 102.1  | (34.5) | 64.8   | 54.2   | 30.1   | 52.0   |
| 2013 | (34.7) | (2.9)  | (30.4) | 65.8   | (37.3) | (25.7) | (19.1) | (26.5) |
| 2014 | 4.8    | (5.9)  | 33.3   | (7.9)  | (9.6)  | 1.8    | (1.6)  | 4.8    |
| 2015 | (13.5) | 7.8    | 47.0   | (15.5) | (23.5) | 7.1    | 16.0   | 5.5    |
| 2016 | (1.4)  | 28.3   | (8.4)  | 49.0   | (18.5) | (20.0) | (9.6)  | (2.3)  |
| 2017 | 16.8   | (15.8) | 56.5   | 13.7   | 86.8   | (27.1) | 12.5   | 22.3   |
| 2018 | (14.4) | 29.5   | 0.5    | (30.1) | (27.3) | 120.0  | 19.2   | 1.3    |
| 2019 | 14.4   | (2.6)  | (23.9) | 62.1   | 43.1   | (14.3) | 10.0   | 1.6    |

# Long Term Trends

## Leisure Tourist Arrivals by Mode of Transport (2012-2019)

LATAM via Punta Arenas remains the most popular route for leisure tourists visiting the Falklands, accounting for 1,256 arrivals in 2019, which although it was a 7.6% drop on 2018, still accounted for almost 65% of all leisure arrivals. Just over 21% of leisure arrivals arrived on the RAF Airbridge, up 15.2% on 2018. Leisure arrivals by sea (mainly cruise passenger exchanges) grew by 30.8% in 2019, and accounted for over 13% of all arrivals.



| Year | RAF Airbridge | LATAM-Chile | LATAM-Brazil | Other Air | Sea | Total |
|------|---------------|-------------|--------------|-----------|-----|-------|
| 2012 | 573           | 916         | 0            | 118       | 333 | 1,940 |
| 2013 | 314           | 786         | 0            | 107       | 219 | 1,426 |
| 2014 | 266           | 926         | 0            | 13        | 289 | 1,494 |
| 2015 | 321           | 978         | 0            | 30        | 247 | 1,576 |
| 2016 | 273           | 1,026       | 0            | 10        | 231 | 1,540 |
| 2017 | 393           | 1,239       | 0            | 16        | 236 | 1,884 |
| 2018 | 342           | 1,359       | 0            | 12        | 195 | 1,908 |
| 2019 | 394           | 1,256       | 16           | 18        | 255 | 1,939 |

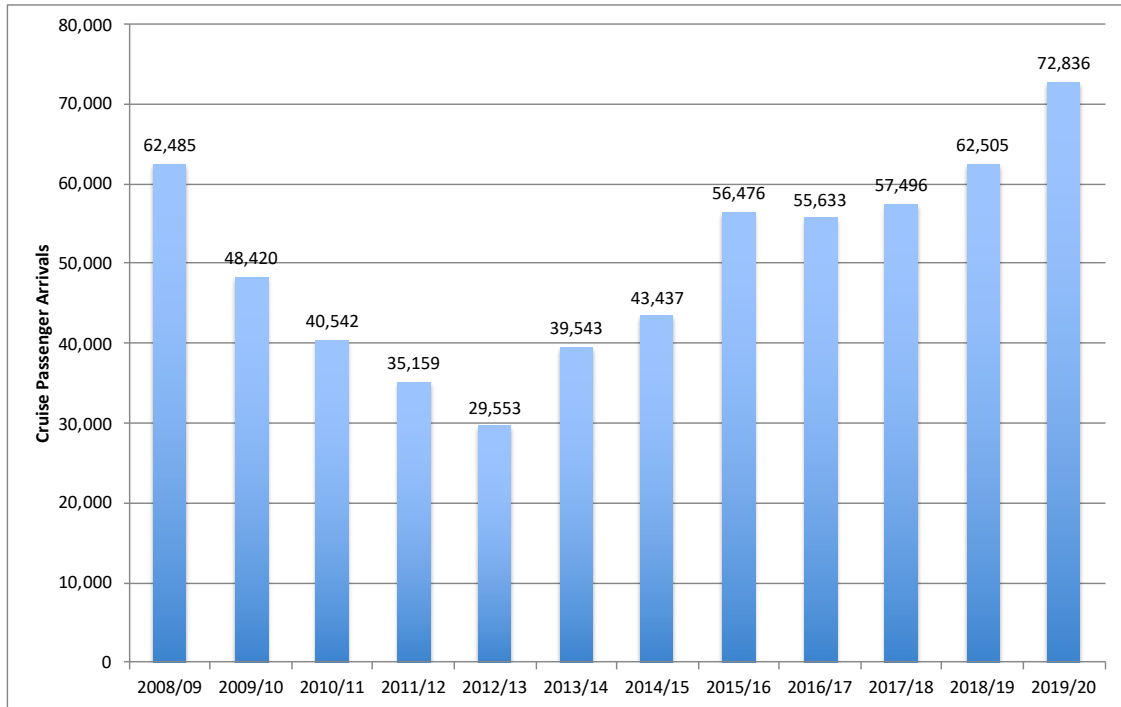
### Year-on-year Growth Rates

|      |        |        |     |        |        |        |
|------|--------|--------|-----|--------|--------|--------|
| 2012 | 154.7  | 8.5    | 0.0 | 293.3  | 88.1   | 52.0   |
| 2013 | (45.2) | (14.2) | 0.0 | (9.3)  | (34.2) | (26.5) |
| 2014 | (15.3) | 17.8   | 0.0 | (87.9) | 32.0   | 4.8    |
| 2015 | 20.7   | 5.6    | 0.0 | 130.8  | (14.5) | 5.5    |
| 2016 | (15.0) | 4.9    | 0.0 | (66.7) | (6.5)  | (2.3)  |
| 2017 | 44.0   | 20.8   | 0.0 | 60.0   | 2.2    | 22.3   |
| 2018 | (13.0) | 9.7    | 0.0 | (25.0) | (17.4) | 1.3    |
| 2019 | 15.2   | (7.6)  | 0.0 | 50.0   | 30.8   | 1.6    |

# Long Term Trends

## Cruise Passenger Arrivals (2008-2020)

There were 72,836 cruise passenger arrivals in the 2019-20 season, the largest number of visitors to ever visit the Falklands in a single season, representing an increase of 16.5% on the previous season. There were 29 vessel cancellations, accounting for the loss of around 9,000 potential visitors.



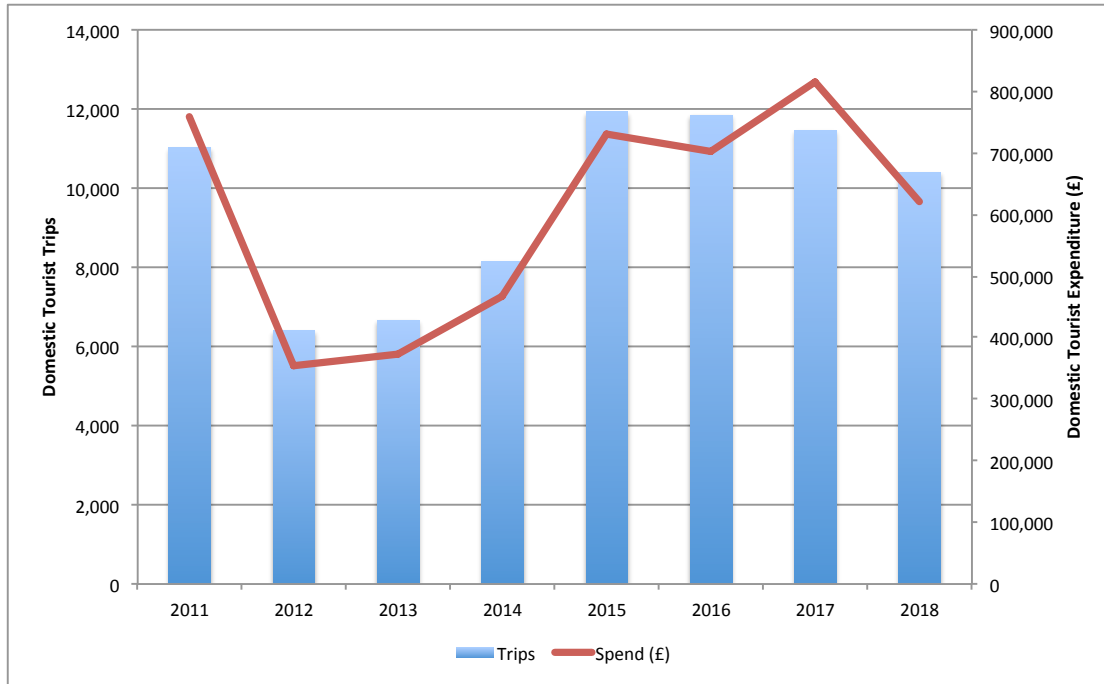
| Season  | Arrivals | Change (%) | Spend/Pax (£) | Total Spend (£) | Change (%) |
|---------|----------|------------|---------------|-----------------|------------|
| 2008/09 | 62,485   |            | 45.73         | 2,857,439       |            |
| 2009/10 | 48,420   | (22.5)     | 32.82         | 1,589,144       | (44.4)     |
| 2010/11 | 40,542   | (16.3)     | 34.50         | 1,398,699       | (12.0)     |
| 2011/12 | 35,159   | (13.3)     | 50.75         | 1,784,319       | 27.6       |
| 2012/13 | 29,553   | (15.9)     | 57.27         | 1,692,500       | (5.1)      |
| 2013/14 | 39,543   | 33.8       | 53.89         | 2,130,972       | 25.9       |
| 2014/15 | 43,437   | 9.8        | 54.87         | 2,383,388       | 11.8       |
| 2015/16 | 56,476   | 30.0       | 49.03         | 2,769,018       | 16.2       |
| 2016/17 | 55,633   | (1.5)      | 57.77         | 3,213,918       | 16.1       |
| 2017/18 | 57,496   | 3.3        | 56.41         | 3,243,349       | 0.9        |
| 2018/19 | 62,505   | 8.7        | 64.89         | 4,055,949       | 25.1       |
| 2019/20 | 72,836   | 16.5       | 60.03         | 4,372,345       | 7.8        |

Expenditure by cruise visitors is calculated from the Cruise Visitor Survey carried out by FITB. Analysis of the 2019/20 season survey showed an average £5 drop in expenditure per passenger, however total expenditure increased to almost £4.4 million, up 7.8% on 2018/19.

# Long Term Trends

## Domestic Tourism Trips and Expenditure (2011-2018)

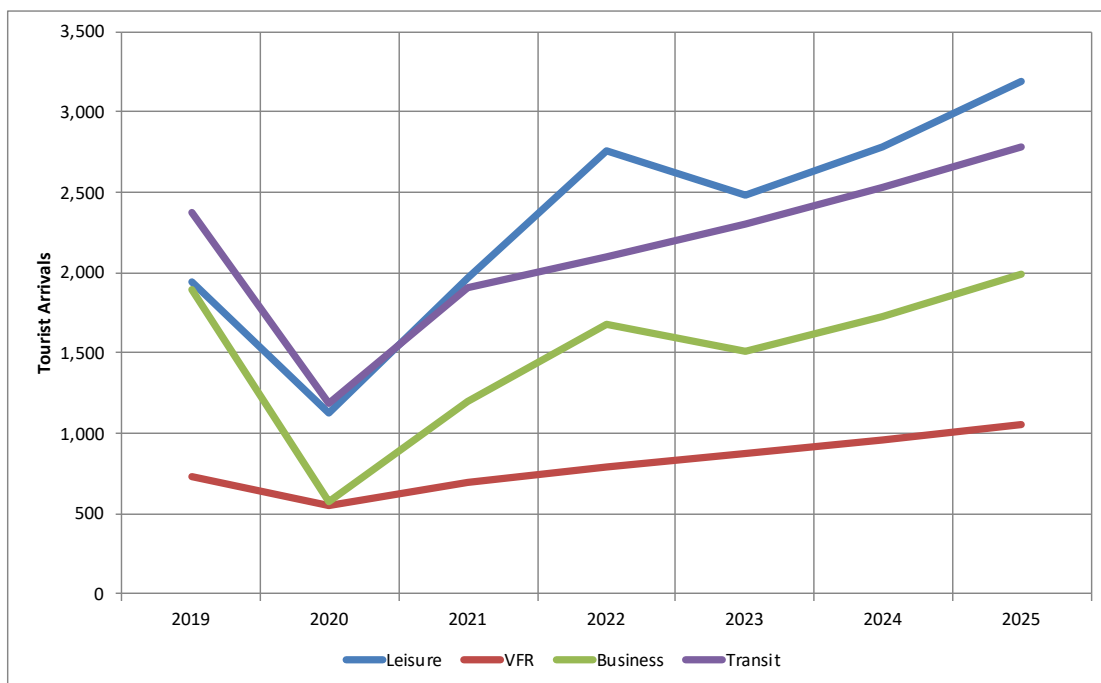
Domestic tourism is estimated from the quarterly Domestic Household Survey undertaken by FITB. Domestic tourism trips have been declining slightly since 2015, although expenditure peaked in 2017. In 2018 there were an estimated 10,400 domestic tourism trips, staying over 39,000 nights and spending almost £622,000.



# Forecasts

## Overnight Tourism Forecasts to 2025

It is currently very difficult making predictions for international tourism arrivals over the next 12 months due to the uncertain nature of the COVID-19 pandemic. However, at present FITB is expecting a contraction of the leisure tourist market of 42% in 2020, with a strong 75% growth bounce-back in 2022. These forecasts will be updated in the next edition of Tourism Quarterly.

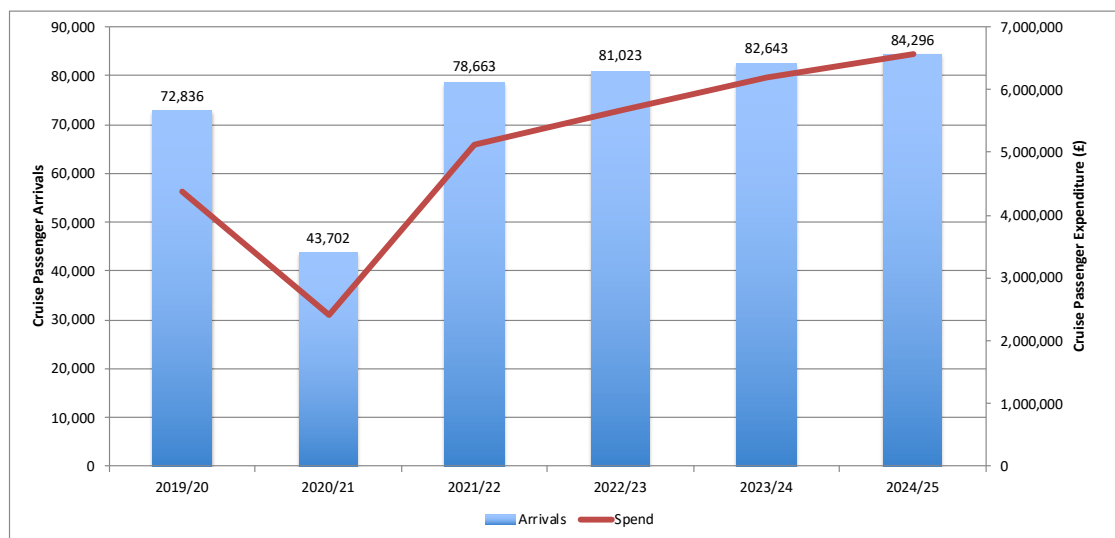


| Year | Leisure | VFR   | Business | Transit | Total | Leisure Growth (%) | Total Growth (%) |
|------|---------|-------|----------|---------|-------|--------------------|------------------|
| 2019 | 1,939   | 736   | 1,897    | 2,378   | 6,950 | 1.6                | 22.5             |
| 2020 | 1,125   | 552   | 569      | 1,189   | 3,435 | (42.0)             | (50.6)           |
| 2021 | 1,968   | 690   | 1,195    | 1,902   | 5,756 | 75.0               | 67.6             |
| 2022 | 2,755   | 794   | 1,673    | 2,093   | 7,315 | 40.0               | 27.1             |
| 2023 | 2,480   | 873   | 1,506    | 2,302   | 7,160 | (10.0)             | (2.1)            |
| 2024 | 2,777   | 960   | 1,732    | 2,532   | 8,001 | 12.0               | 11.7             |
| 2025 | 3,194   | 1,056 | 1,991    | 2,785   | 9,027 | 15.0               | 12.8             |

# Forecasts

## Cruise Passenger Arrivals and Expenditure Forecasts to 2025

The number of cruise passenger arrivals to the Falklands is currently expected to contract by 40% in the 2020-2021 season due to the COVID-19 pandemic, but it is anticipated that there will be a strong bounce-back of 80% the following season to generate the largest number of visitors to the Islands ever. These forecasts will be updated in the next edition of Tourism Quarterly.



| Season  | Arrivals | Arrivals Growth (%) | Total Spend (£) | Spend Growth (%) |
|---------|----------|---------------------|-----------------|------------------|
| 2019/20 | 72,836   | 16.5                | 4,372,345       | 7.8              |
| 2020/21 | 43,702   | (40.0)              | 2,403,588       | (45.0)           |
| 2021/22 | 78,663   | 80.0                | 5,113,087       | 112.7            |
| 2022/23 | 81,023   | 3.0                 | 5,671,594       | 10.9             |
| 2023/24 | 82,643   | 2.0                 | 6,198,242       | 9.3              |
| 2024/25 | 84,296   | 2.0                 | 6,575,095       | 6.1              |



# Introduction

Despite the current concern and uncertainty regarding next season, this edition of *Tourism Quarterly* provides a comprehensive overview of how last season performed, and how 2019 compared to previous years.

Although the season ended prematurely in March, a total of 1,648 leisure tourists visited the Islands during the period October-March, a 6.7% growth on the previous season. There were 1,939 leisure tourists visiting in 2019, up 1.6% on that recorded in 2018.

FIGAS carried a record 3,255 tourists in 2019, 27.3% more than were moved in 2018. Serviced Room Occupancy rates were up to 49.1%, almost 4 percentage points higher than in 2018, and the cruise season beat all previous records with 72,836 passenger arrivals, up 16.5% on the previous season.

This edition of *Tourism Quarterly* includes all the data from Q1 2020, as well as summaries for the season and for 2019. It also includes the findings from our annual air and cruise visitor surveys, which show overnight leisure visitors spent £4.8 million, up 12% on 2018, and cruise visitors spent £4.4 million, up 7.8% on the previous season. Overall international inbound visitors for all purposes spent over £15 million during the last year, a significant earner for the local economy.

Finally, whilst the future is particularly uncertain at this time, we've updated our forecasts for land-based and cruise visitor tourism to 2025, which are included at the back of the report. By the end of June we will publish *our 2019 Annual Tourism Statistics Report* which will provide detailed analysis of the season and 2019.

As always, please drop me a line with any comments or thoughts you have about *Tourism Quarterly*. The aim of the publication is to provide useful and easily accessible information for everyone involved in tourism.

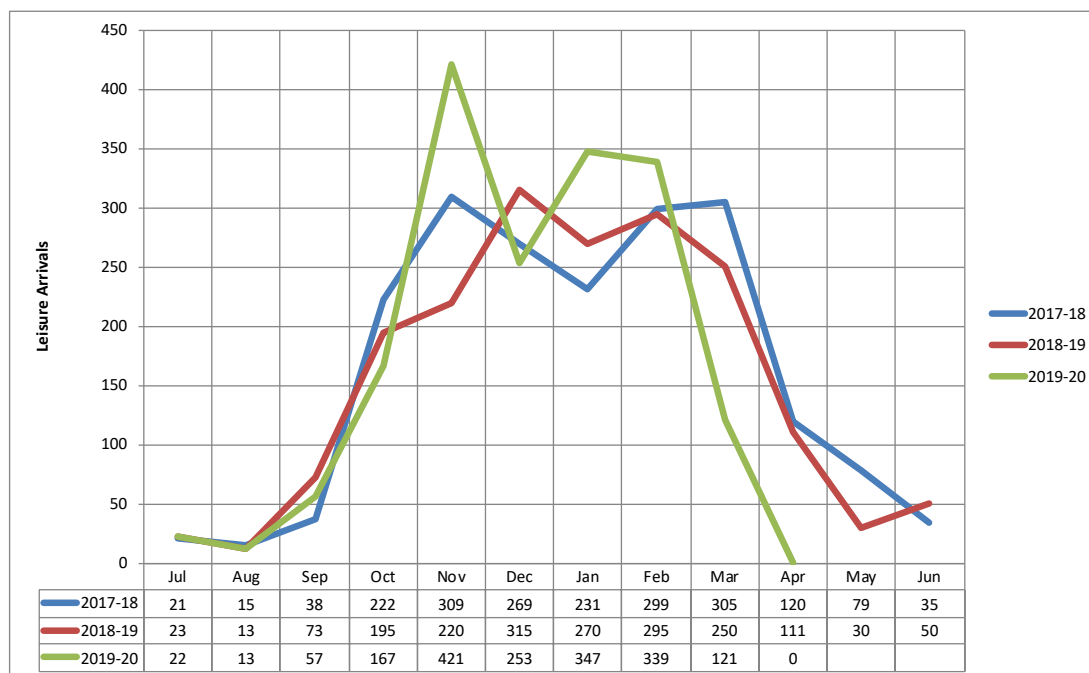


**Stephanie Middleton**  
Executive Director

# This Quarter

## Leisure Tourist Arrivals

Leisure tourist arrivals were marginally down 1.0% in Q1 2020 compared to the same period in 2019. January and February performed strongly, however the early end to the season due to the COVID-19 pandemic caused a sharp drop off in March.

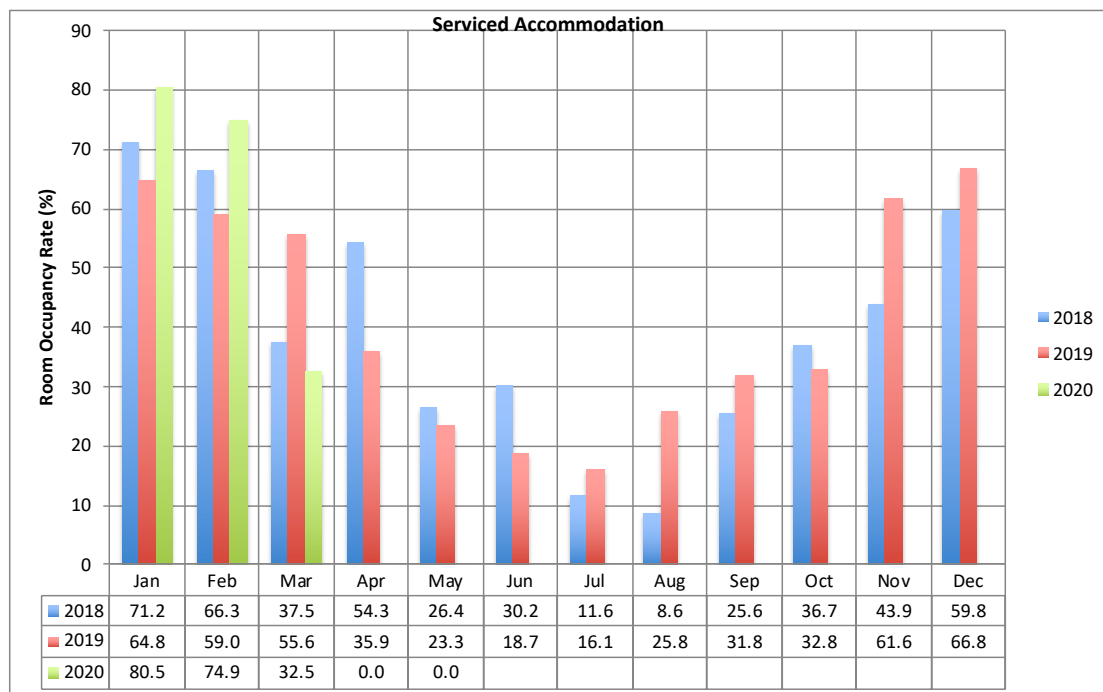


| Month | 2017-18 | 2018-19 | 2019-20 | Change (%) |
|-------|---------|---------|---------|------------|
| Jul   | 21      | 23      | 22      | (4.3)      |
| Aug   | 15      | 13      | 13      | 0.0        |
| Sep   | 38      | 73      | 57      | (21.9)     |
| Oct   | 222     | 195     | 167     | (14.4)     |
| Nov   | 309     | 220     | 421     | 91.4       |
| Dec   | 269     | 315     | 253     | (19.7)     |
| Jan   | 231     | 270     | 347     | 28.5       |
| Feb   | 299     | 295     | 339     | 14.9       |
| Mar   | 305     | 250     | 121     | (51.6)     |
| Apr   | 120     | 111     |         |            |
| May   | 79      | 30      |         |            |
| Jun   | 35      | 50      |         |            |

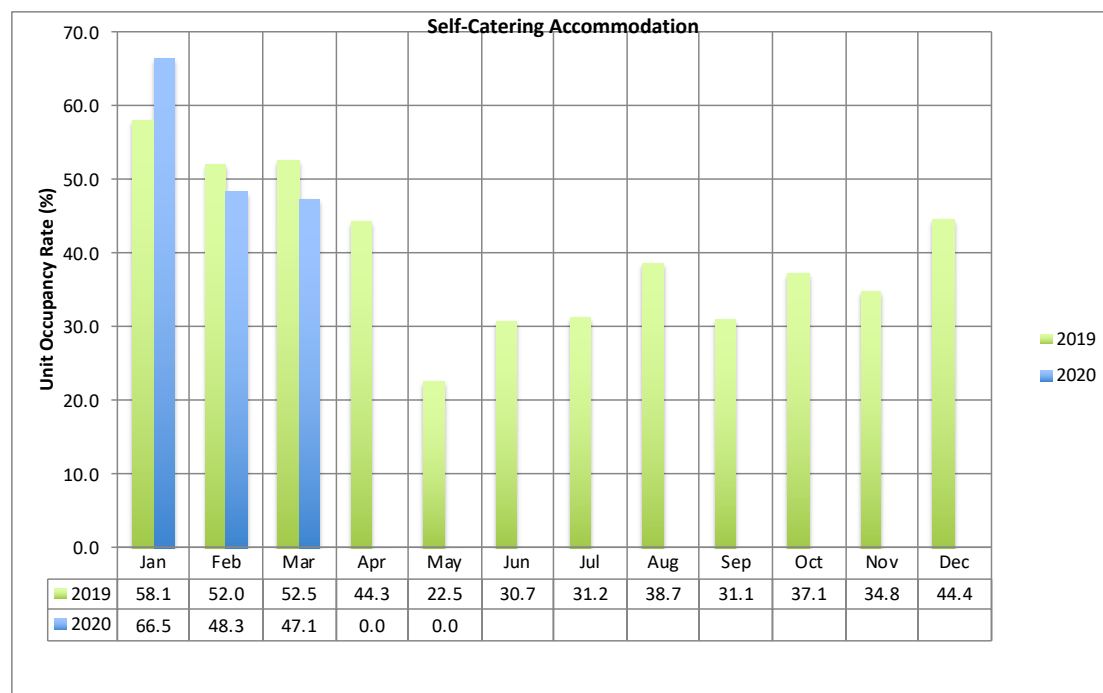
# This Quarter

## Accommodation Occupancy

Very much reflecting the pattern in tourist arrivals, serviced accommodation room rates were up significantly in January and February, reaching a record high of 80.5% in January. However, due to the drop in arrivals in March, occupancy was affected, achieving only 32.5%, less than in the previous two years.



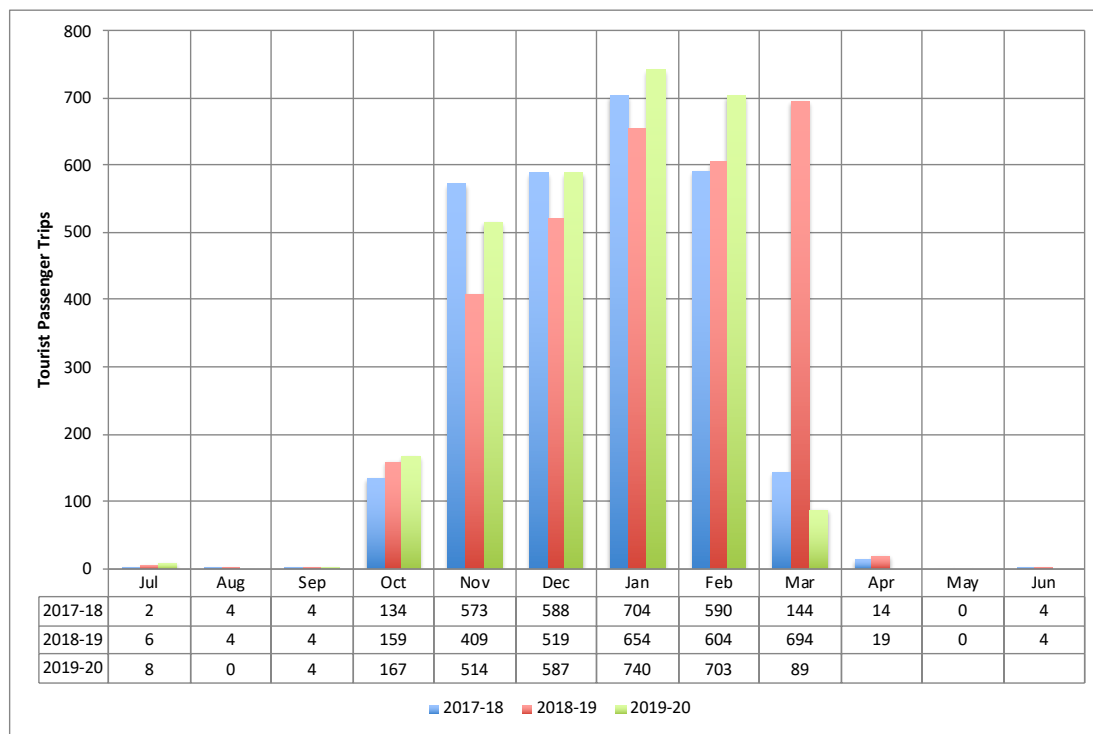
Self-catering accommodation was also strong in January, achieving 66.5%. However, rates in February and March were slightly lower than those achieved in 2019.



# This Quarter

## Tourist Passengers Carried on FIGAS

A record 740 leisure passenger trips were flown by tourists in January, and February was also very busy (703). However due to the shortening of the 2019-2020 season, this dropped to just 89 in March.



| Month | 2017-18 | 2018-19 | 2019-20 | % Growth |
|-------|---------|---------|---------|----------|
| Jul   | 2       | 6       | 8       | 33.3     |
| Aug   | 4       | 4       | 0       | -        |
| Sep   | 4       | 4       | 4       | 0.0      |
| Oct   | 134     | 159     | 167     | 5.0      |
| Nov   | 573     | 403     | 514     | 25.7     |
| Dec   | 588     | 519     | 587     | 13.1     |
| Jan   | 704     | 654     | 740     | 13.1     |
| Feb   | 590     | 604     | 703     | 16.4     |
| Mar   | 144     | 694     | 89      | (87.2)   |
| Apr   | 14      | 19      |         |          |
| May   | 0       | 0       |         |          |
| Jun   | 4       | 4       |         |          |

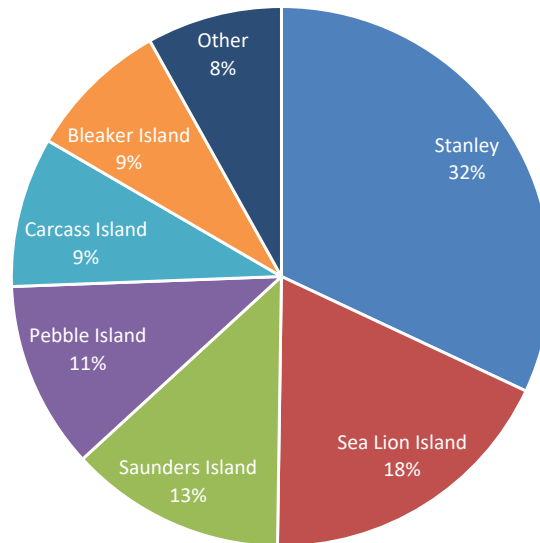
Courtesy of FIGAS

# This Quarter

## Tourist Passengers Carried on FIGAS by Destination

Analysis by place of arrival shows that almost one-third (32%) of all tourist arrivals were to Stanley, with the busiest destination in camp being Sea Lion Island (18% of all arrivals), followed by Saunders Island (13%) and Pebble Island (11%).

| Destination     | %     |
|-----------------|-------|
| Stanley         | 32.0  |
| Sea Lion Island | 18.3  |
| Saunders Island | 12.9  |
| Pebble Island   | 11.2  |
| Carcass Island  | 9.0   |
| Bleaker Island  | 8.5   |
| Port Howard     | 3.2   |
| Darwin          | 2.0   |
| Weddell Island  | 1.3   |
| Mount Pleasant  | 0.9   |
| Fox Bay         | 0.4   |
| Other           | 0.4   |
| All Arrivals    | 100.0 |



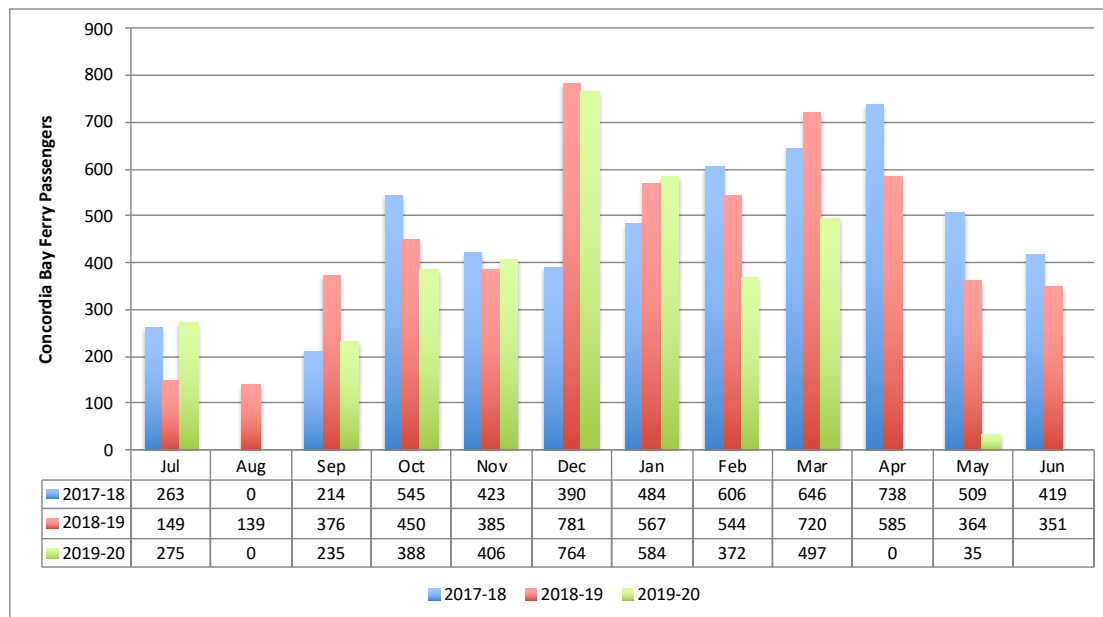
Courtesy of FIGAS



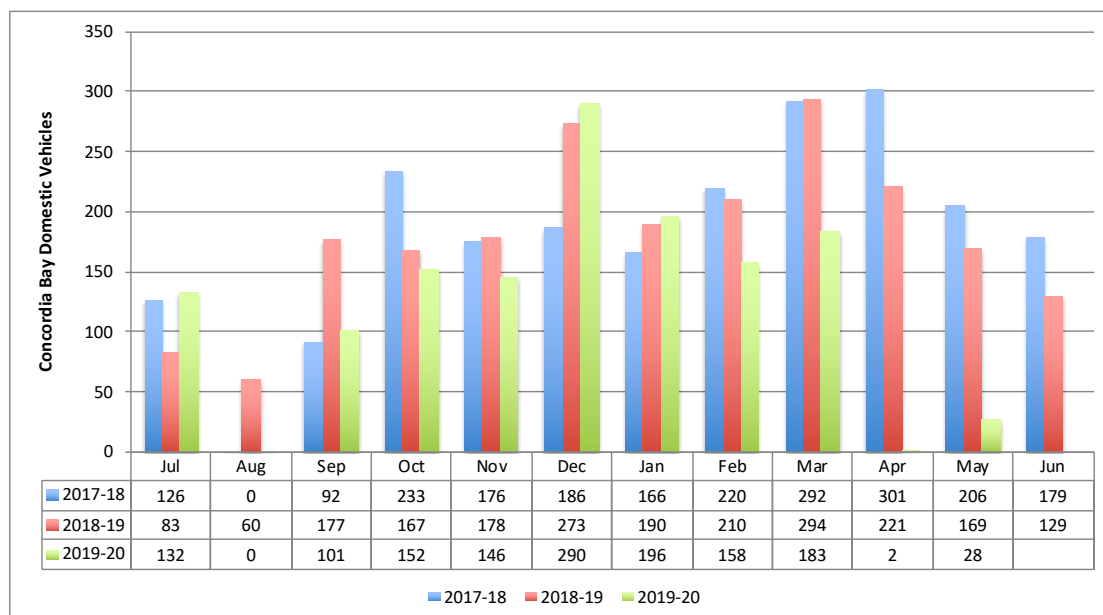
# This Quarter

## Passengers and Domestic Vehicles on Concordia Bay Ferry

Passengers carried between East and West Falkland on the Concordia Bay Ferry fell by 20.6% in Q1 2020 compared to the same period in 2019. Whilst January was busier than in 2018 or 2019, there were considerably fewer passengers travelling in February and March.



Similarly, vehicles carried were also down, by 22.6% in Q1 2020 compared to the same period in 2019.

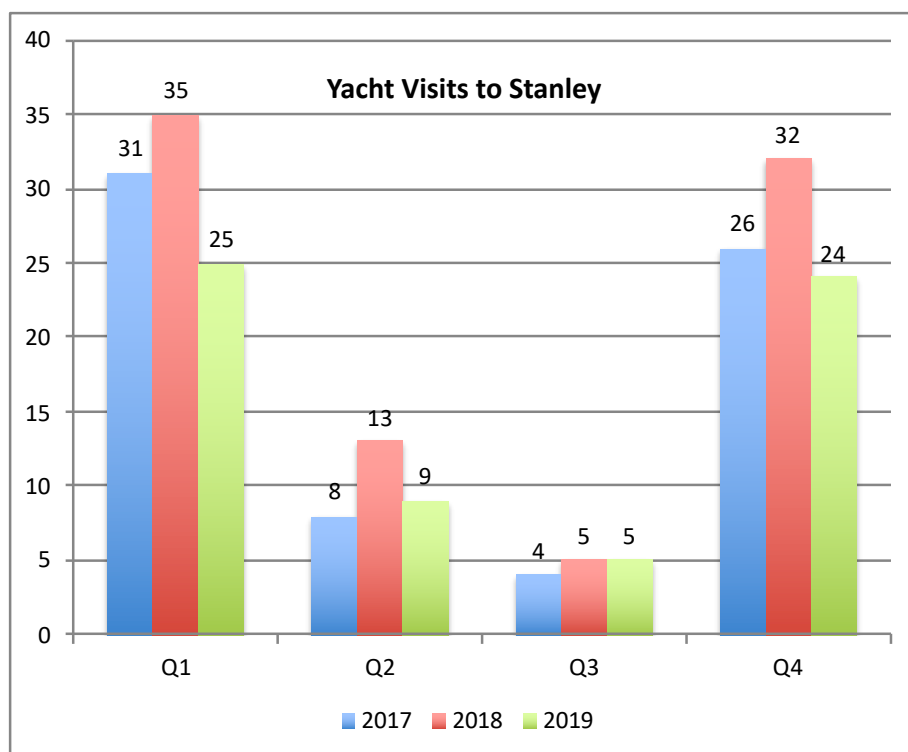




# This Quarter

## Yacht Visits to Stanley

There has been no update regarding yacht arrivals in Stanley during Q1 2020 to report in this edition of Tourism Quarterly



Courtesy of Falkland Islands Yacht Club

## Jetty Visitor Centre Footfall

The JVC footfall was up by 3.4% in Q1 2020 compared to the same period in 2019. A total of 54,066 people visited the JVC in Q1, and almost 82,000 over the whole Oct 2019-Mar 2020 season, which represents a 10.1% increase over the previous season.

| Month        | 2017-18       | 2018-19       | 2019-20 | % Growth |
|--------------|---------------|---------------|---------|----------|
| Jul          | 314           | 0             | 327     | -        |
| Aug          | 316           | 284           | 399     | 40.5     |
| Sep          | 616           | 480           | 620     | 29.2     |
| Oct          | 4,437         | 3,604         | 1,103   | (69.4)   |
| Nov          | 7,689         | 6,616         | 9,644   | 45.8     |
| Dec          | 10,202        | 11,841        | 17,054  | 44.0     |
| Jan          | 21,265        | 17,877        | 18,881  | 5.6      |
| Feb          | 19,249        | 22,749        | 23,804  | 4.6      |
| Mar          | 7,755         | 11,646        | 11,381  | (2.3)    |
| Apr          | 507           | 1,505         |         |          |
| May          | 543           | 421           |         |          |
| Jun          | 282           | 314           |         |          |
| <b>Total</b> | <b>73,175</b> | <b>77,337</b> |         |          |

# This Quarter

Website: [www.falklandislands.com](http://www.falklandislands.com)

The number of unique visitors to the website continues to exhibit strong growth. There were almost 55,000 unique visitors in March, and then stronger growth in April. The number of pages viewed passed the 100,000 market between March and April for the first time.

| Website | Unique Visitors |        |       | Pages Viewed |         |      |
|---------|-----------------|--------|-------|--------------|---------|------|
|         | 2019            | 2020   | (%)   | 2019         | 2020    | (%)  |
| Jan     | 24,680          | 37,528 | 52.1  | 74,700       | 96,847  | 29.6 |
| Feb     | 22,909          | 32,534 | 42.0  | 54,147       | 79,004  | 45.9 |
| Mar     | 24,787          | 55,183 | 122.6 | 57,291       | 97,089  | 69.5 |
| Apr     | 27,207          | 62,980 | 131.5 | 60,538       | 111,644 | 84.4 |
| May     | 24,813          | 47,140 | 90.0  | 55,261       | 89,330  | 61.7 |
| Jun     | 22,171          |        |       | 48,188       |         |      |
| Jul     | 26,053          |        |       | 55,830       |         |      |
| Aug     | 25,351          |        |       | 58,708       |         |      |
| Sep     | 35,889          |        |       | 78,812       |         |      |
| Oct     | 36,852          |        |       | 81,799       |         |      |
| Nov     | 36,563          |        |       | 87,044       |         |      |
| Dec     | 37,383          |        |       | 86,953       |         |      |

## Social Media: Facebook and Twitter

Facebook reach was down on the same period in 2019, but has started to perform particularly well from March due to new algorithms being used. Twitter impressions were up in January but below the 2019 figures for the remainder of the quarter.

| Social Media | Facebook Reach |         |        | Twitter Impressions |        |        |
|--------------|----------------|---------|--------|---------------------|--------|--------|
|              | 2019           | 2020    | (%)    | 2019                | 2020   | (%)    |
| Jan          | 1,354,670      | 413,157 | (69.5) | 40,100              | 58,200 | 45.1   |
| Feb          | 2,610,402      | 367,639 | (85.9) | 76,500              | 43,300 | (43.4) |
| Mar          | 622,928        | 962,729 | 54.5   | 57,300              | 47,500 | (17.1) |
| Apr          | 631,993        | 820,452 | 29.8   | 49,300              | 42,600 | (13.6) |
| May          | 532,994        | 676,246 | 26.9   | 46,000              | 37,800 | (17.8) |
| Jun          | 443,445        |         |        | 30,200              |        | #NUM!  |
| Jul          | 801,624        |         |        | 55,600              |        | #NUM!  |
| Aug          | 654,400        |         |        | 64,700              |        | #NUM!  |
| Sep          | 603,570        |         |        | 39,500              |        | #NUM!  |
| Oct          | 396,304        |         |        | 53,500              |        | #NUM!  |
| Nov          | 364,800        |         |        | 58,200              |        | #NUM!  |
| Dec          | 419,434        |         |        | 57,500              |        | #NUM!  |

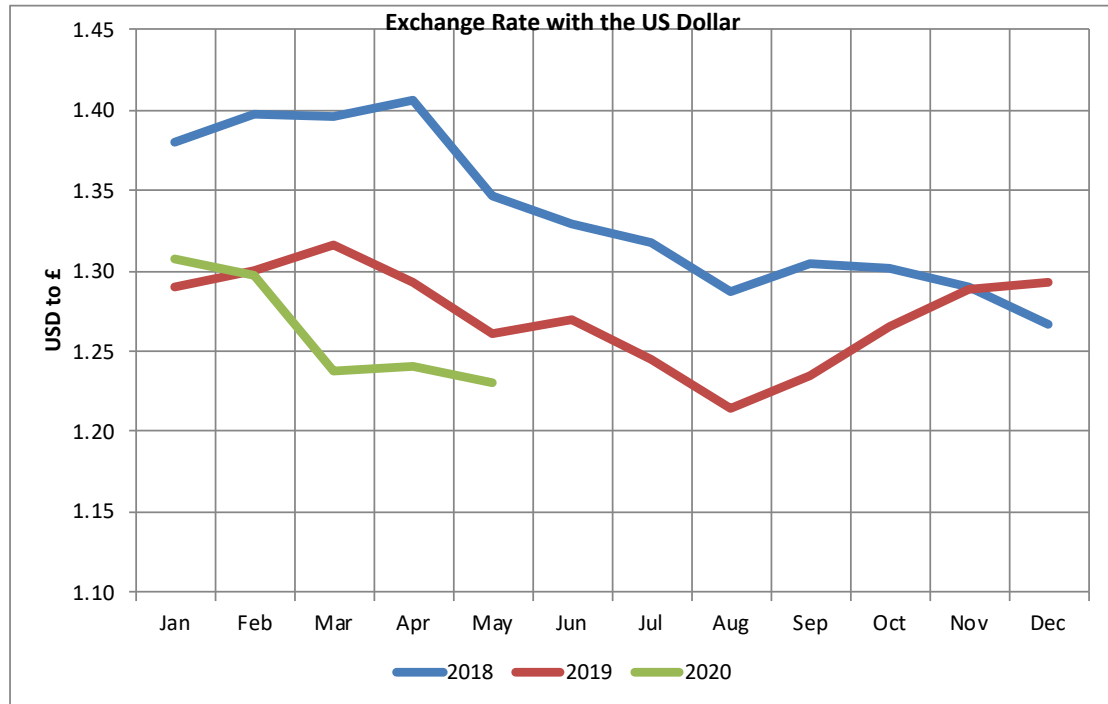
*Facebook Reach: Total number times a post is displayed (seen) in the month*

*Twitter Impressions: Total number of times a tweet is displayed (seen) in the month*

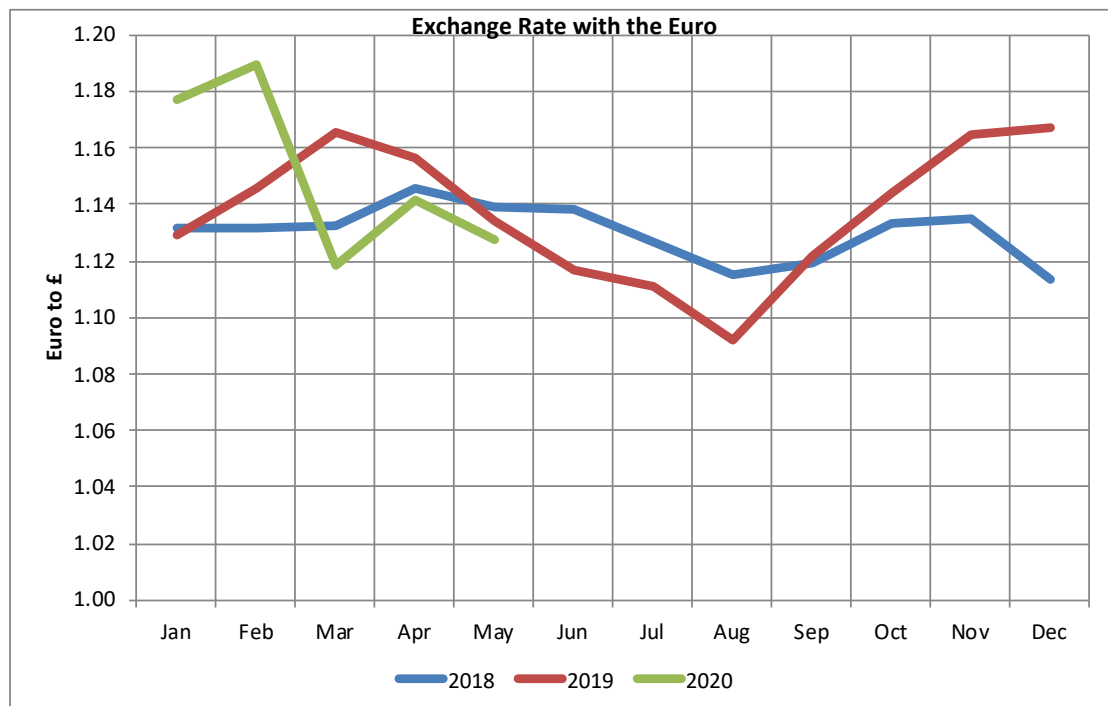
# This Quarter

## Currency Exchange Rates

**US Dollar:** During Q1 the pound weakened against the dollar, and by March it was almost back to its lowest point in 2019. This makes the Falklands cheaper for US visitors and is therefore good for inbound travel.



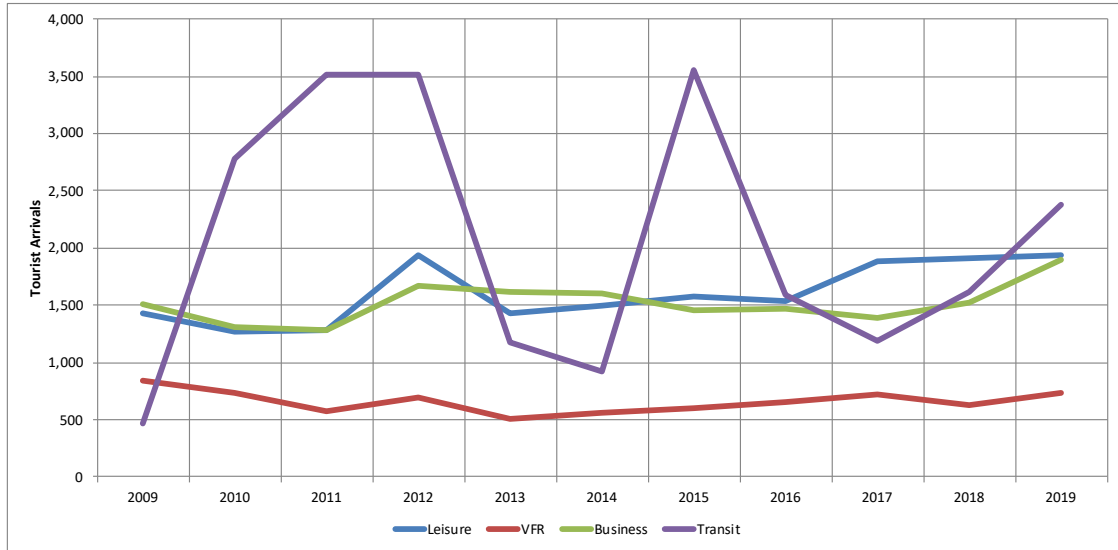
**Euro:** The value of the pound also weakened against the euro during Q1 largely due to the COVID-19 pandemic. This makes the Falklands cheaper for eurozone visitors and is therefore good for inbound travel.



# Long Term Trends

## Tourist Arrivals by Purpose of Visit (2009-2019)

Leisure tourism grew by 1.6% in 2019, which represents three straight years of growth from 1,540 in 2016 to 1,939 in 2019. Visits to friends and relatives (VFR) also grew, by 17.2%, business visitors grew by 24.6%, and transit visitors by 47.2%. Overall, tourist arrivals for all purposes grew by 22.5%.

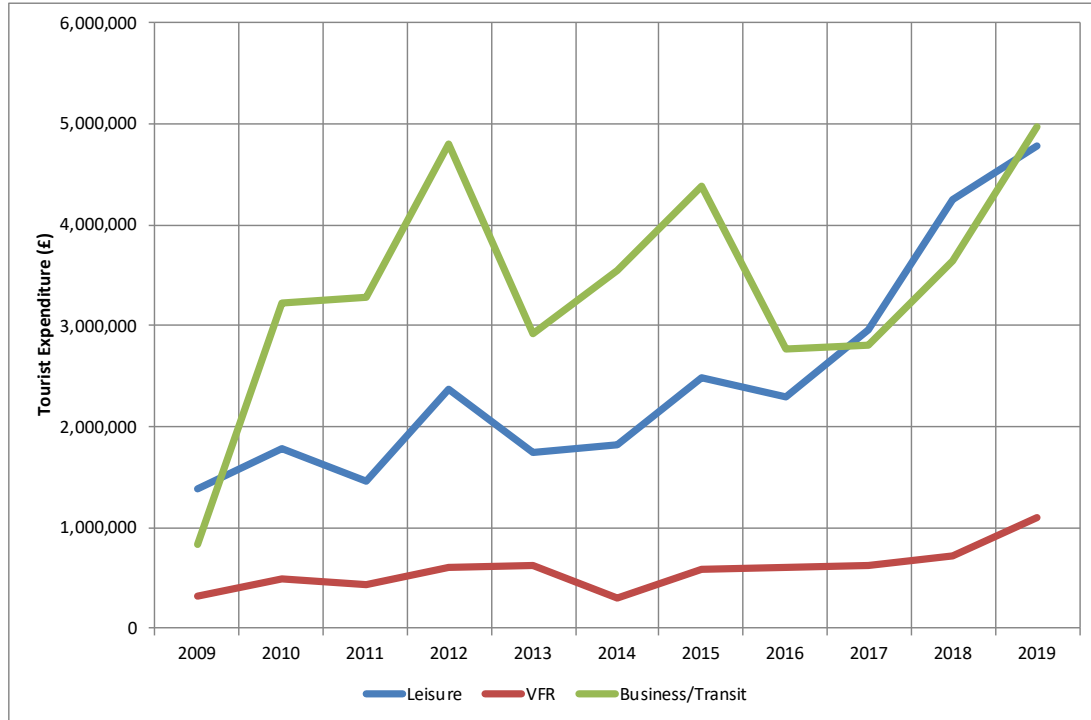


| Year | Leisure | VFR | Business | Transit | Total | Leisure Growth (%) | Total Growth (%) |
|------|---------|-----|----------|---------|-------|--------------------|------------------|
| 2009 | 1,429   | 839 | 1,510    | 468     | 4,246 | (16.9)             | (17.0)           |
| 2010 | 1,271   | 735 | 1,314    | 2,778   | 6,098 | (11.1)             | 43.6             |
| 2011 | 1,276   | 578 | 1,277    | 3,518   | 6,649 | 0.4                | 9.0              |
| 2012 | 1,940   | 693 | 1,672    | 3,507   | 7,812 | 52.0               | 17.5             |
| 2013 | 1,426   | 501 | 1,621    | 1,179   | 4,727 | (26.5)             | (39.5)           |
| 2014 | 1,494   | 559 | 1,599    | 922     | 4,574 | 4.8                | (3.2)            |
| 2015 | 1,576   | 605 | 1,455    | 3,553   | 7,189 | 5.5                | 57.2             |
| 2016 | 1,540   | 657 | 1,468    | 1,584   | 5,249 | (2.3)              | (27.0)           |
| 2017 | 1,884   | 718 | 1,392    | 1,184   | 5,178 | 22.3               | (1.4)            |
| 2018 | 1,908   | 628 | 1,522    | 1,615   | 5,673 | 1.3                | 9.6              |
| 2019 | 1,939   | 736 | 1,897    | 2,378   | 6,950 | 1.6                | 22.5             |

# Long Term Trends

## Tourist Expenditure by Purpose of Visit (2009-2019)

Tourist (all purposes) expenditure is calculated from the Air Visitor Survey undertaken by FITB at MPA. In 2019, leisure tourism generated almost £4.8 million in visitor expenditure (up 12.4%), with all types of tourist generating over £10.8 million (up 25.7%).

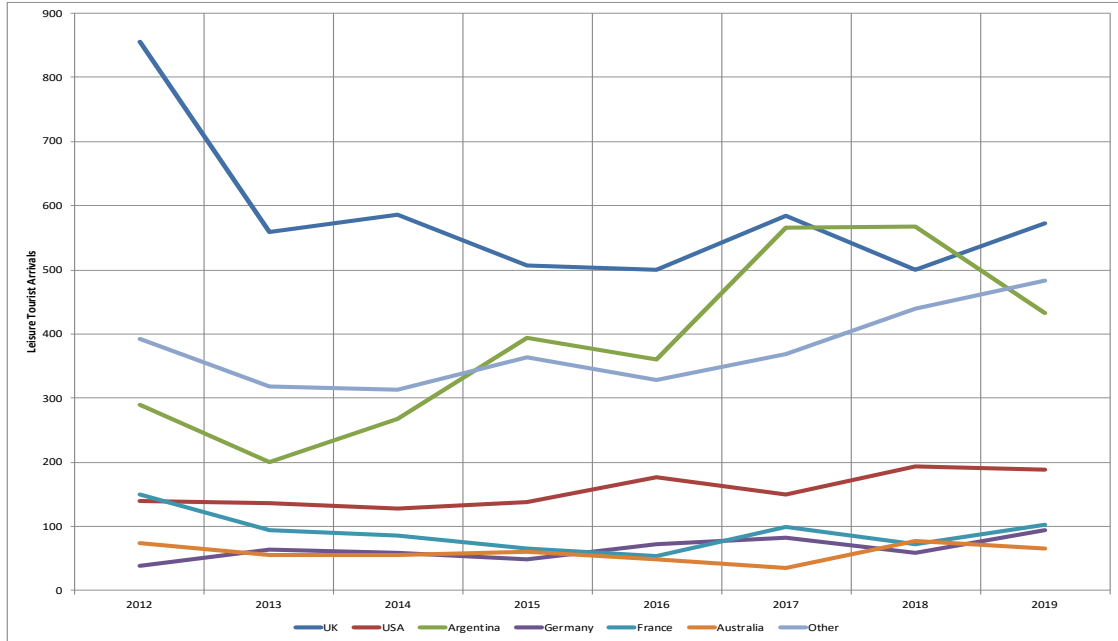









| Year | Leisure (£) | VFR (£)   | Business and Transit (£) | Total (£)  |
|------|-------------|-----------|--------------------------|------------|
| 2009 | 1,377,367   | 316,014   | 827,058                  | 2,520,439  |
| 2010 | 1,784,484   | 491,199   | 3,217,856                | 5,493,539  |
| 2011 | 1,466,762   | 433,566   | 3,277,600                | 5,177,928  |
| 2012 | 2,367,014   | 605,500   | 4,802,000                | 7,774,514  |
| 2013 | 1,738,650   | 615,209   | 2,918,767                | 5,272,625  |
| 2014 | 1,820,273   | 297,587   | 3,541,343                | 5,659,203  |
| 2015 | 2,485,046   | 587,700   | 4,375,710                | 7,448,457  |
| 2016 | 2,301,832   | 600,524   | 2,759,802                | 5,662,158  |
| 2017 | 2,952,562   | 622,746   | 2,798,967                | 6,374,276  |
| 2018 | 4,248,173   | 727,273   | 3,638,649                | 8,614,095  |
| 2019 | 4,776,858   | 1,094,563 | 4,958,630                | 10,830,052 |

# Long Term Trends

## Leisure Tourist Arrivals by Country of Residence (2012-2019)

The UK, the Falklands' main market, bounced back to prominence in 2019 with a 14.4% growth. Visitors from Argentina fell by almost 24%, and there was a small decline in leisure tourists from the USA and Australia. Both Germany and France exhibited strong growth, and the "Other" countries increased their market share, now representing 25% of all arrivals.



| Year |  |  |  |  |  |  |  | Total |
|------|---|---|---|---|---|--|---|-------|
| 2012 | 856   | 140   | 289   | 38  | 150   | 74   | 393   | 1,940 |
| 2013 | 559   | 136   | 201   | 63  | 94  | 55   | 318   | 1,426 |
| 2014 | 586   | 128   | 268   | 58  | 85  | 56   | 313   | 1,494 |
| 2015 | 507   | 138   | 394   | 49  | 65  | 60   | 363   | 1,576 |
| 2016 | 500   | 177   | 361   | 73  | 53  | 48   | 328   | 1,540 |
| 2017 | 584   | 149   | 565   | 83  | 99  | 35   | 369   | 1,884 |
| 2018 | 500   | 193   | 568   | 58  | 72  | 77   | 440   | 1,908 |
| 2019 | 572   | 188   | 432   | 94  | 103   | 66   | 484   | 1,939 |

### Year-on-year Growth Rates

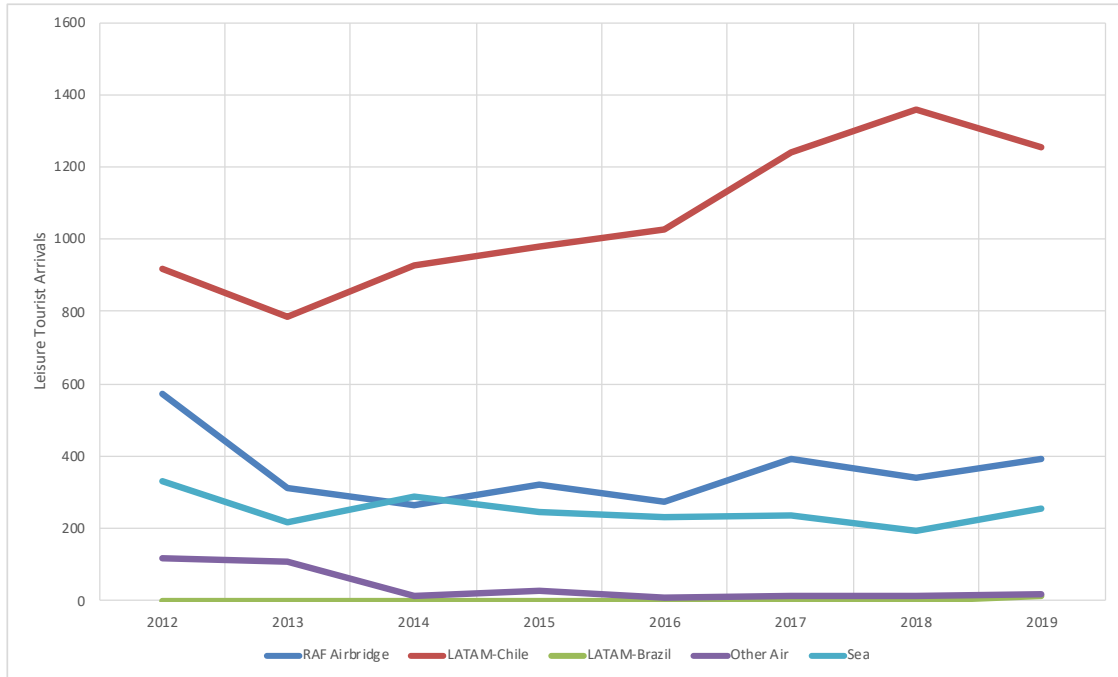
|      |        |        |        |        |        |        |        |        |
|------|--------|--------|--------|--------|--------|--------|--------|--------|
| 2012 | 60.9   | 37.3   | 102.1  | (34.5) | 64.8   | 54.2   | 30.1   | 52.0   |
| 2013 | (34.7) | (2.9)  | (30.4) | 65.8   | (37.3) | (25.7) | (19.1) | (26.5) |
| 2014 | 4.8    | (5.9)  | 33.3   | (7.9)  | (9.6)  | 1.8    | (1.6)  | 4.8    |
| 2015 | (13.5) | 7.8    | 47.0   | (15.5) | (23.5) | 7.1    | 16.0   | 5.5    |
| 2016 | (1.4)  | 28.3   | (8.4)  | 49.0   | (18.5) | (20.0) | (9.6)  | (2.3)  |
| 2017 | 16.8   | (15.8) | 56.5   | 13.7   | 86.8   | (27.1) | 12.5   | 22.3   |
| 2018 | (14.4) | 29.5   | 0.5    | (30.1) | (27.3) | 120.0  | 19.2   | 1.3    |
| 2019 | 14.4   | (2.6)  | (23.9) | 62.1   | 43.1   | (14.3) | 10.0   | 1.6    |



# Long Term Trends

## Leisure Tourist Arrivals by Mode of Transport (2012-2019)

LATAM via Punta Arenas remains the most popular route for leisure tourists visiting the Falklands, accounting for 1,256 arrivals in 2019, which although it was a 7.6% drop on 2018, still accounted for almost 65% of all leisure arrivals. Just over 21% of leisure arrivals arrived on the RAF Airbridge, up 15.2% on 2018. Leisure arrivals by sea (mainly cruise passenger exchanges) grew by 30.8% in 2019, and accounted for over 13% of all arrivals.



| Year | RAF Airbridge | LATAM-Chile | LATAM-Brazil | Other Air | Sea | Total |
|------|---------------|-------------|--------------|-----------|-----|-------|
| 2012 | 573           | 916         | 0            | 118       | 333 | 1,940 |
| 2013 | 314           | 786         | 0            | 107       | 219 | 1,426 |
| 2014 | 266           | 926         | 0            | 13        | 289 | 1,494 |
| 2015 | 321           | 978         | 0            | 30        | 247 | 1,576 |
| 2016 | 273           | 1,026       | 0            | 10        | 231 | 1,540 |
| 2017 | 393           | 1,239       | 0            | 16        | 236 | 1,884 |
| 2018 | 342           | 1,359       | 0            | 12        | 195 | 1,908 |
| 2019 | 394           | 1,256       | 16           | 18        | 255 | 1,939 |

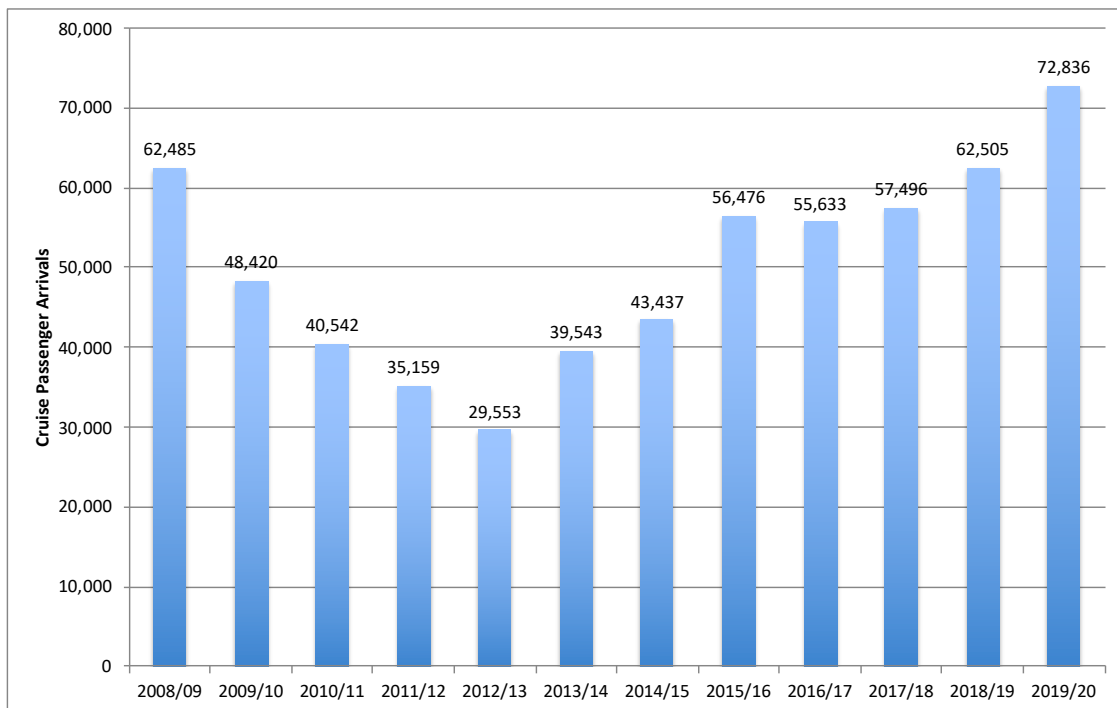
### Year-on-year Growth Rates

|      |        |        |     |        |        |        |
|------|--------|--------|-----|--------|--------|--------|
| 2012 | 154.7  | 8.5    | 0.0 | 293.3  | 88.1   | 52.0   |
| 2013 | (45.2) | (14.2) | 0.0 | (9.3)  | (34.2) | (26.5) |
| 2014 | (15.3) | 17.8   | 0.0 | (87.9) | 32.0   | 4.8    |
| 2015 | 20.7   | 5.6    | 0.0 | 130.8  | (14.5) | 5.5    |
| 2016 | (15.0) | 4.9    | 0.0 | (66.7) | (6.5)  | (2.3)  |
| 2017 | 44.0   | 20.8   | 0.0 | 60.0   | 2.2    | 22.3   |
| 2018 | (13.0) | 9.7    | 0.0 | (25.0) | (17.4) | 1.3    |
| 2019 | 15.2   | (7.6)  | 0.0 | 50.0   | 30.8   | 1.6    |

# Long Term Trends

## Cruise Passenger Arrivals (2008-2020)

There were 72,836 cruise passenger arrivals in the 2019-20 season, the largest number of visitors to ever visit the Falklands in a single season, representing an increase of 16.5% on the previous season. There were 29 vessel cancellations, accounting for the loss of around 9,000 potential visitors.



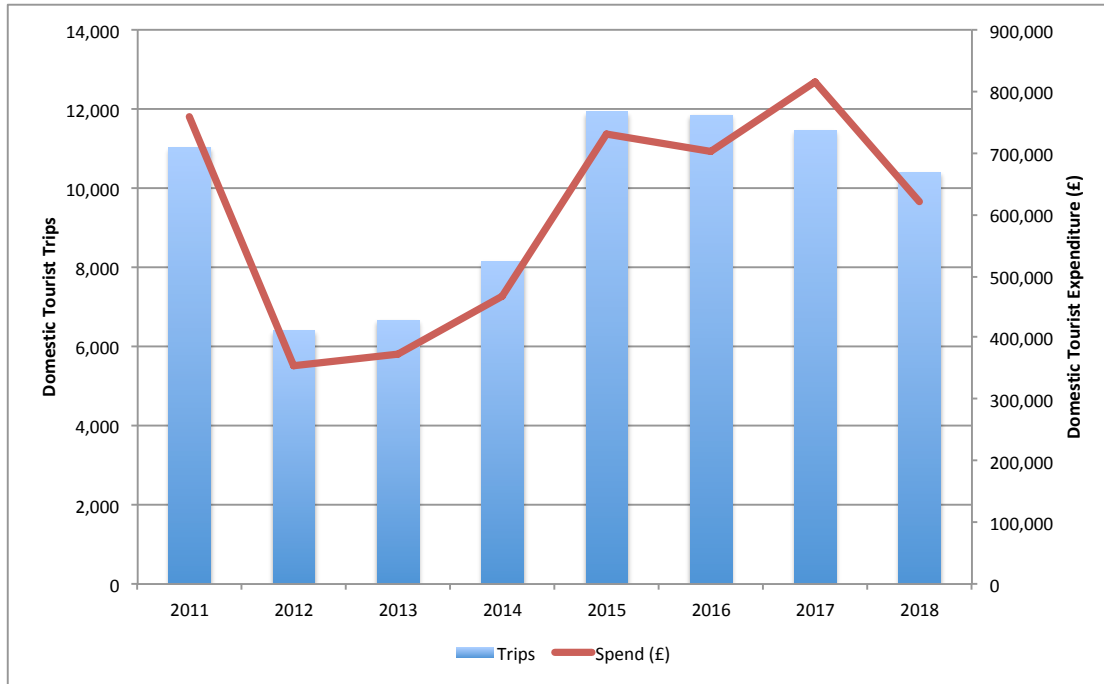
| Season  | Arrivals | Change (%) | Spend/Pax (£) | Total Spend (£) | Change (%) |
|---------|----------|------------|---------------|-----------------|------------|
| 2008/09 | 62,485   |            | 45.73         | 2,857,439       |            |
| 2009/10 | 48,420   | (22.5)     | 32.82         | 1,589,144       | (44.4)     |
| 2010/11 | 40,542   | (16.3)     | 34.50         | 1,398,699       | (12.0)     |
| 2011/12 | 35,159   | (13.3)     | 50.75         | 1,784,319       | 27.6       |
| 2012/13 | 29,553   | (15.9)     | 57.27         | 1,692,500       | (5.1)      |
| 2013/14 | 39,543   | 33.8       | 53.89         | 2,130,972       | 25.9       |
| 2014/15 | 43,437   | 9.8        | 54.87         | 2,383,388       | 11.8       |
| 2015/16 | 56,476   | 30.0       | 49.03         | 2,769,018       | 16.2       |
| 2016/17 | 55,633   | (1.5)      | 57.77         | 3,213,918       | 16.1       |
| 2017/18 | 57,496   | 3.3        | 56.41         | 3,243,349       | 0.9        |
| 2018/19 | 62,505   | 8.7        | 64.89         | 4,055,949       | 25.1       |
| 2019/20 | 72,836   | 16.5       | 60.03         | 4,372,345       | 7.8        |

Expenditure by cruise visitors is calculated from the Cruise Visitor Survey carried out by FITB. Analysis of the 2019/20 season survey showed an average £5 drop in expenditure per passenger, however total expenditure increased to almost £4.4 million, up 7.8% on 2018/19.

# Long Term Trends

## Domestic Tourism Trips and Expenditure (2011-2018)

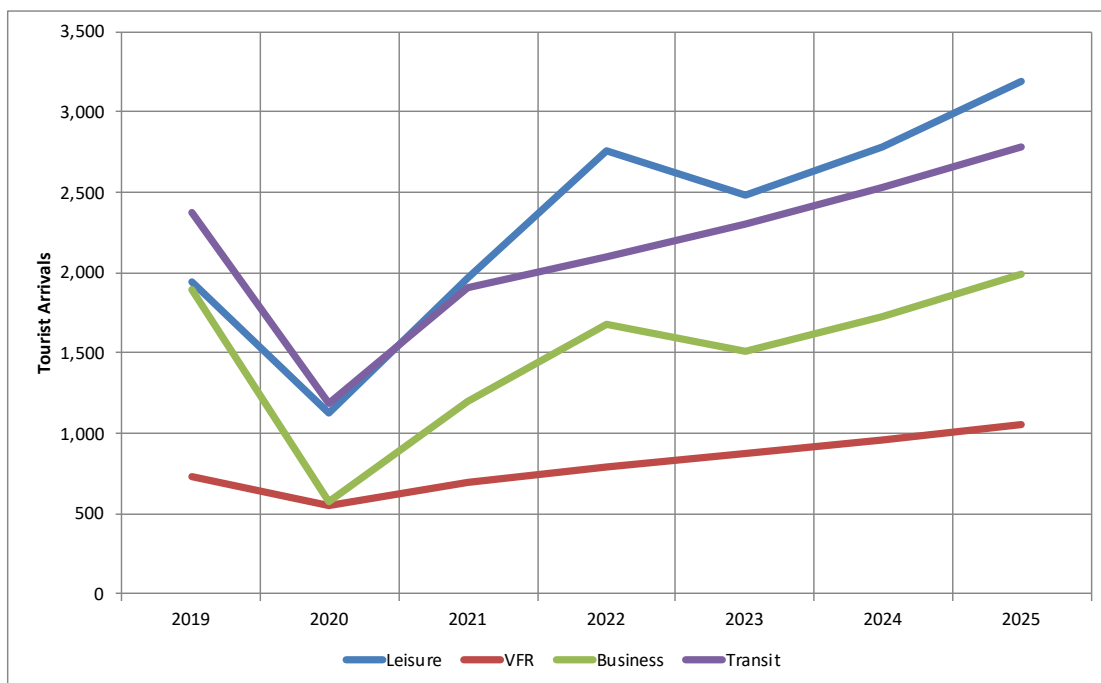
Domestic tourism is estimated from the quarterly Domestic Household Survey undertaken by FITB. Domestic tourism trips have been declining slightly since 2015, although expenditure peaked in 2017. In 2018 there were an estimated 10,400 domestic tourism trips, staying over 39,000 nights and spending almost £622,000.



# Forecasts

## Overnight Tourism Forecasts to 2025

It is currently very difficult making predictions for international tourism arrivals over the next 12 months due to the uncertain nature of the COVID-19 pandemic. However, at present FITB is expecting a contraction of the leisure tourist market of 42% in 2020, with a strong 75% growth bounce-back in 2022. These forecasts will be updated in the next edition of Tourism Quarterly.

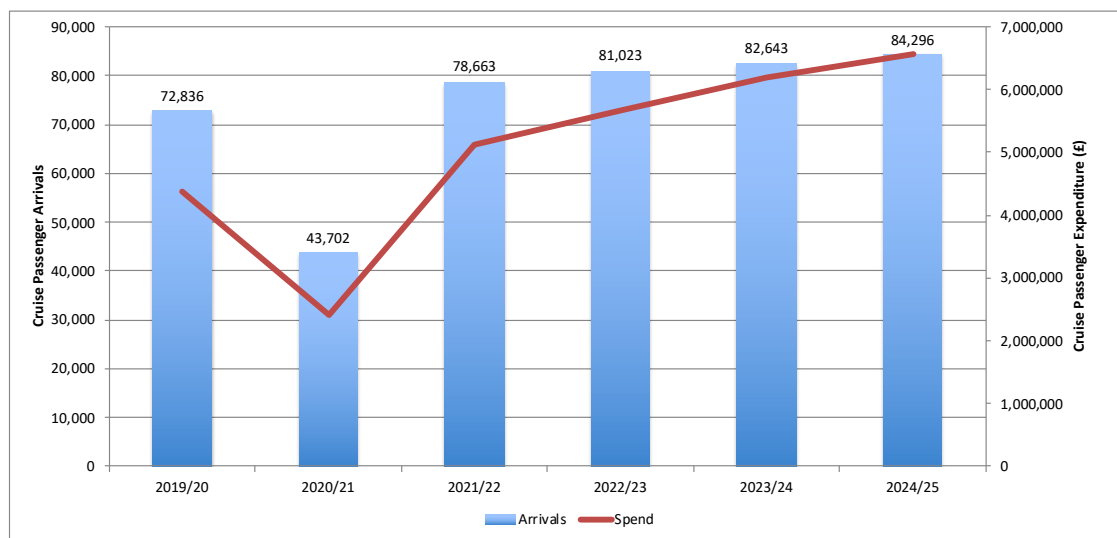


| Year | Leisure | VFR   | Business | Transit | Total | Leisure Growth (%) | Total Growth (%) |
|------|---------|-------|----------|---------|-------|--------------------|------------------|
| 2019 | 1,939   | 736   | 1,897    | 2,378   | 6,950 | 1.6                | 22.5             |
| 2020 | 1,125   | 552   | 569      | 1,189   | 3,435 | (42.0)             | (50.6)           |
| 2021 | 1,968   | 690   | 1,195    | 1,902   | 5,756 | 75.0               | 67.6             |
| 2022 | 2,755   | 794   | 1,673    | 2,093   | 7,315 | 40.0               | 27.1             |
| 2023 | 2,480   | 873   | 1,506    | 2,302   | 7,160 | (10.0)             | (2.1)            |
| 2024 | 2,777   | 960   | 1,732    | 2,532   | 8,001 | 12.0               | 11.7             |
| 2025 | 3,194   | 1,056 | 1,991    | 2,785   | 9,027 | 15.0               | 12.8             |

# Forecasts

## Cruise Passenger Arrivals and Expenditure Forecasts to 2025

The number of cruise passenger arrivals to the Falklands is currently expected to contract by 40% in the 2020-2021 season due to the COVID-19 pandemic, but it is anticipated that there will be a strong bounce-back of 80% the following season to generate the largest number of visitors to the Islands ever. These forecasts will be updated in the next edition of Tourism Quarterly.



| Season  | Arrivals | Arrivals Growth (%) | Total Spend (£) | Spend Growth (%) |
|---------|----------|---------------------|-----------------|------------------|
| 2019/20 | 72,836   | 16.5                | 4,372,345       | 7.8              |
| 2020/21 | 43,702   | (40.0)              | 2,403,588       | (45.0)           |
| 2021/22 | 78,663   | 80.0                | 5,113,087       | 112.7            |
| 2022/23 | 81,023   | 3.0                 | 5,671,594       | 10.9             |
| 2023/24 | 82,643   | 2.0                 | 6,198,242       | 9.3              |
| 2024/25 | 84,296   | 2.0                 | 6,575,095       | 6.1              |